City and County of San Francisco



Edwin M. Lee, Mayor

Human Services Agency

Department of Human Services Department of Aging and Adult Services

Trent Rhorer, Executive Director

MEMORANDUM

TO:	AGING & ADULT SERVICES COMMISSION
THROUGH:	SHIREEN MCSPADDEN, EXECUTIVE DIRECTOR
FROM:	CINDY KAUFFMAN, DEPUTY DIRECTOR JOHN TSUTAKAWA, DIRECTOR OF CONTRACTS Jui
DATE:	OCTOBER 4, 2017
SUBJECT:	GRANT MODIFICATION: MULTIPLE GRANTEES (NON- PROFIT) FOR THE PROVISION OF LEGAL SERVICES FOR SENIORS & YOUNGER ADULTS WITH DISABILITIES
GRANT TERM:	Original Term Modification Term 7/1/15-6/30/18 7/1/17-6/30/18
TOTAL GRANT AMOUNT:	CurrentModificationNewContingencyTotal\$1,915,489\$159,825\$2,075,314\$207,531\$2,282,845
ANNUAL AMOUNT:	See table below
MODIFICATION FUNDING PERCENTAGE:	County State Federal Contingency Total \$159,825 \$15,983 \$175,808 100% 100% 100%

The Department of Aging and Adult Services (DAAS) requests authorization to modify three existing grants for the provision of legal services for Seniors & Younger Adults with Disabilities for the time period beginning July 1, 2017 to June 30, 2018 in the combined amount of \$159,825 plus a 10% contingency of \$15,983 for a total not to exceed amount of \$2,294,725. The purpose of these grants is to ensure the rights and entitlements of Seniors & Younger Adults with Disabilities (YAD) by providing or securing legal services. The specific breakdown of funding per grantee is summarized in the following table.

Agency	Current FY 17/18	Modification: Legal Services Staff Retention/ Salary Support FY17/18	Modification: YAD Program Expansion FY17/18	Total Modification	Revised FY 17/18	Current Grant Total	Revised Grant Total	10% Contingency	Total not to exceed
Independent Living Resource Center	\$89,250	\$6,450	\$40,625	\$47,075	\$136,325	\$178,500	\$225,575	\$22,558	\$248,133
La Raza Centro Legal	\$149,217	*\$0	\$40,625	\$40,625	\$189,842	\$444,098	\$484,723	\$48,472	\$533,195
Legal Assistance to the Elderly	\$434,496	\$31,500	\$40,625	\$72,125	\$506,621	\$1,292,891	\$1,365,016	\$136,502	\$1,501,518
Total	\$672,963	\$37,950	\$121,875	\$159,825	\$832,788	\$1,915,489	\$2,075,314	\$207,531	\$2,282,845

*\$10,800 in funds have been made available, pending agreement on allocation plan.

Background

Legal Services can be critical to maintaining or securing a better quality of life for Seniors and Adults with Disabilities. DAAS' Legal Services providers work to provide their clients with information and advice designed to allow them to make more informed decisions and assert their rights on a variety of issues. Examples include: representing a senior tenant facing eviction, navigating a complex and expedited legal process to help save their housing; working with an adult to ensure they have access to income and health insurance benefits based on their disability; coordinating with Adult Protective Services to secure a protective order preventing an abuser from contacting a frail senior being targeted for financial exploitation.

Through the initial Dignity Fund allocation process, the new funding for Legal Services presented today has been designated for two purposes:

1) Staff retention and salary improvement. Funds will be directed to help providers pay more competitive salaries and/or benefits in order to retain dedicated and knowledgeable staff.

2) Increase services for Younger Adults with Disabilities. Funding provided today will increase capacity of Legal Services for Younger Adults with Disabilities by 67% over current service levels.

Services to be Provided

Typically, consumers seeking Legal Services from a DAAS provider go through an initial screening process. Upon completion of screening, further services can be described as one of the following:

- 1. Information and Referral the consumer concern is more appropriately referred to another service for assistance.
- 2. Advise and Close the consumer issue is very easily addressed, advice is provided and the case is closed

- 3. Brief Services the consumer is in need of assistance to prepare legal correspondence, fill out an official form, review legal documents, etc.
- 4. Case Acceptance the consumer issue warrants more extensive legal representation and a case file is opened, i.e., elder abuse, consumer fraud, challenging eviction, etc.

Legal Service providers should maintain expertise and provide services in at least one of the following issue areas:

- a) Income/Nutrition (SSI, Social Security, Pensions/Retirement, CalFresh/Supplemental Nutrition Assistance Program (SNAP), Unemployment)
- b) Housing/Utilities (Tenant Rights, Real Property, Utilities)
- c) Long-term Care (SNF, Facility issues, Community-based, long-term care services)
- d) Healthcare (MediCal, Medicare, Managed care, Provider/services access, Private/Insurance)
- e) Protective Services/Elder Abuse/Defense against Conservatorship (Conservatorship issues with a focus on defending older persons against guardianship as called for in the OAA § 321(a)(6)), Restraining Orders, Abuse/neglect, Exploitation, Advanced Planning/Autonomy/Advance Directives)
- f) Consumer (Bankruptcy/debt, Contracts/warranties, Scams/identity theft)
- g) Civil Rights (LEP Rights, Discrimination, Immigration)

The most common areas of focus for DAAS' legal services providers continue to be public benefits, housing (eviction prevention), and elder abuse protection.

Grantee Selections

Grantees were selected through Request for Proposals (RFP) 635, which was competitively bid in February 2015.

Grantee Performance

Grantee was found to be compliant with Citywide Fiscal and Compliance Monitoring standards for the fiscal year 2016-2017.

Program Monitoring for each Grantee took place in June 2017. All grantees were found to be compliant with program requirements for fiscal year 2016-2017.

Funding

This modification will be funded 100% through County General funds.

Attachments

Independent Living Resource Center Appendix A1 – Services to be Provided -YAD Appendix B1 – Program Budget

La Raza Centro Legal

*Appendix A1 – Services to be Provided – Senior (*Pending agreement on allocation plan) Appendix A2 – Services to be Provided- YAD Appendix B1 – Program Budget

Legal Assistance to the Elderly

Appendix A1- Services to be Provided - Senior

Appendix A2- Services to be Provided - YAD Appendix B1 – Program Budget

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APPENDIX A-1 – Services to be Provided

Independent Living Resource Center – San Francisco (ILRCSF) Legal Services for Younger Adults with Disabilities (YAD)

July 1, 2017 – June 30, 2018

I. Purpose

The purpose of this grant is to ensure the rights and entitlements of younger adults with disabilities by providing or securing legal services.

II. Definitions

California State Bar	The State Bar of California is the regulatory agency for the State's lawyers, charged with admitting and disciplining attorneys.
DAAS	Department of Aging and Adult Services
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments 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.
Grantee	Independent Living Resource Center – San Francisco (ILRC)
HSA	Human Services Agency of City and County of San Francisco
Legal Assistance	Legal advice and representation provided by an attorney to younger adults with disabilities with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a non-lawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro se assistance.
OAA	Older Americans Act
Senior	Person who is 60 years or older.

SOGI	Sexual Orientation and Gender Identity, a result of Ordinance No. 159-16 which amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9.)
Younger Adult with Disability	Person 18 years of age or older living with a disability.

III. Target Population

Individuals between 18 and 59 years of age that are living with disabilities. Services should target clients who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-Income
- Non or limited English speaking
- Minority
- Frail
- LGBT

IV. Eligibility for Legal Services

- 1) A resident of San Francisco
- 2) Aged 18 to 59 living with a disability*

*It will be a best practice to allow the consumer to self-identify to the extent possible. However, should there be a case where the consumer's disability status based solely on selfidentification is in question, additional verification may be requested. The Grantee will be permitted to ask the consumer to provide any one of the following items: a) Disabled Transit Identification card; b) Medi-Care card; c) Social Security Disability Insurance card, or, as a last resort, d) Medical verification.

V. Location and Time of Services

Services are delivered at 825 Howard Street, San Francisco. Time of Services: Monday – Friday from the hours of 9:00am to 4:30pm (or by appointment).

VI. Description of Services

Legal Services program providers help eligible consumers with a variety of legal issues including benefit appeals, eviction prevention, consumer fraud/issues, elder abuse prevention, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters.

Legal services and intervention is critical to maintaining or securing a better quality of life affecting seniors and adults with disabilities. Legal service program providers work in conjunction with other service providers to carefully assess and triage consumer needs. In addition, legal service providers are expected to keep up with changes in the law that affect seniors and adults with disabilities, particularly in the issue areas in which services are provided.

Consumers contacting legal services go through an initial screening process. In general, senior legal providers categorize the service they give into the following four modules:

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

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

Areas of expertise for Legal Service Grantees should include at least one of the following:

- a) Income/Nutrition (SSI, Social Security, Pensions/Retirement, CalFresh/Supplemental Nutrition Assistance Program (SNAP), Unemployment)
- b) Housing/Utilities (Tenant Rights, Real Property, Utilities)
- c) Long-term Care (SNF, Facility issues, Community-based, long-term care services)
- d) Healthcare (MediCal, Medicare, Managed care, Provider/services access, Private/Insurance)
- e) Protective Services/Elder Abuse/Defense against Conservatorship (Conservatorship issues with a focus on defending older persons against guardianship as called for in the OAA § 321(a)(6)), Restraining Orders, Abuse/neglect, Exploitation, Advanced Planning/Autonomy/advance directives
- f) Consumer (Bankruptcy/debt, Contracts/warranties, Scams/identity theft)
- g) Civil Rights (LEP Rights, Discrimination, Immigration)

Consumers can expect that the legal service provider is experienced and knowledgeable about working with an younger adult with disability population. Legal Service Providers should be as culturally and linguistically competent as possible to serve an ethnically diverse population.

The Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and the Office on the Aging to help develop and maintain a comprehensive citywide approach to legal service issues. The Grantee may also conduct special outreach activities and/or attends relevant community events for visibility and enabling

collaborations. The Legal Services program providers help eligible consumers with, but not limited to, benefit appeals, eviction prevention, consumer fraud/issues, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters.

VII. Service Objectives

On an annual basis:

- Grantee will serve a minimum of <u>159</u> unduplicated consumers (younger adults with disabilities).
- Grantee will provide a minimum of <u>1,587</u> units of service of legal assistance. Legal assistance includes providing legal information, advice, counseling, administrative representation, and judicial representation to an individual or to a group by a member of the California State Bar or by a non-attorney under the supervision and control of a member of the California State Bar. A unit is one hour of legal assistance.

VIII. Outcome Objectives

- 1. Grantee will, on an annual basis, provide a report summarizing the following:
 - a. Total number of unduplicated clients served
 - b. Breakdown of legal issues assisted with (e.g. benefit application, benefit appeal, health care directive, etc.) and how many clients in each category
 - c. Within each category types of services provided (brief service, advice and counsel, representation)
 - d. Outcome within each category (i.e. success rate)
 - e. Other statistics as requested by DAAS Program and Contract Analyst
- 2. Grantee will, on a quarterly basis, provide a narrative report summarizing legal trends presented by client base, obstacles, and successes the program experienced during the quarter.

IX. Reporting Requirements

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

- A. The grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- B. Monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system regarding the following:
 - 1. Number of unduplicated consumers 18 years of age to 59 years of age with a disability served during the month.
 - 2. Number of units of legal assistance services provided during the month.

- C. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system.
- D. Grantee will provide an annual consumer satisfaction survey report to OOA by March 15 each grant year.
- E. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as requested by HSA. The due date for submitting the annual summary report is July 10th.
- F. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA.
- H. 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:

Michael Zaugg, Program Analyst DAAS, Office on the Aging P.O. Box 7988 San Francisco, CA 94120-7988 michael.zaugg@sfgov.org

Judy Ng, Contract Manager Human Services Agency P.O. Box 7988 San Francisco, CA 94120-7988 judy.ng@sfgov.org

X. Monitoring Activities

A. <u>Program Monitoring</u>: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA Getcare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting, evidence that program staff have completed the California Department of Aging (CDA) Security Awareness Training; program operation, which includes a review of a written policies and procedures manual of all OOA funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII.

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

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					Other Revenues
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\$225,575	\$136,325	\$47,075	\$89,250	\$89,250	General Fund
					HSA Revenues
\$225,575	\$136,325	\$47,075	\$89,250	\$89,250	Total Expenditures
\$13,8//	100,2¢	(\$8,743)	\$11,310	\$11,310	indirect Cost (Line 10 X Line 15) Capital Expenditure
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\$211,698	\$133	\$	\$7	\$77,940	Subtotal
\$34,399	\$11,828	(\$10,743)	\$22,571	\$22,571	Operating Expense
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13 Attorney	\$70,000	100%	100%	100%	\$42,000	\$42,000	\$28,000	\$70,000	\$112,000
14 Executive Director	\$100,502	100%	1%	1%	\$1,005	\$1,005	\$0	\$1,005	\$2,010
15 Community Coordinator	\$56,650	100%	1%	1%	\$567	\$567	(\$567)	\$0	\$567
16 Legal Assistant	\$56,250	100%	50%	20%	\$0	\$0	\$28,125	\$28,125	\$28,125
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30 TOTALS		4.00	1.52	1.52	\$43,572	\$43,572	\$55,558	\$99,130	\$142,702
32 FRINGE BENEFIT RATE	27%				27%	27%	20%	23%	24%
33 EMPLOYEE FRINGE BENEFITS					\$11,797	\$11,797	\$11,003	\$22,800	\$34,597
36 TOTAL SALARIES & BENEFITS	0\$				\$55,369	\$55,369	\$66,561	\$121,930	\$177,299

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13 Rental of Property	pperty		\$9,988	\$9,988	(\$9,988)	\$0	\$9,988
Utilities(Elec.	14 Utilities(Elec, Water, Gas, Phone, Scaveng	ger)	\$2,945	\$2,945	(\$2,945)	\$0	\$2,945
15 Office Supplies, Postage	ies, Postage	2	\$191	\$191	(\$191)	\$0	\$191
16 Building Mair	Building Maintenance Supplies and Repair	L			ļ		
17 Printing and	Printing and Reproduction	1	\$61	\$61	(\$61)	\$0	\$61
18 Insurance (Malpractice)	Aalpractice)	4	\$3,218	\$3,218	\$2,252	\$5,470	\$8,688
19 Staff Training	ß	I	\$2,435	\$2,435	(\$2,435)	\$0	\$2,435
Staff Travel-	20 Staff Travel-(Local & Out of Town)	1	\$30	\$30	(\$30)	\$0	\$30
Rental of Eq	21 Rental of Equipment & Software	3	\$1,486	\$1,486	(\$1,486)	\$0	\$1,486
22 CONSULTA	CONSULTANT/SUBCONTRACTOR DESC	CRIPTIVE TITLE					
23 Language Line	ine		\$731	\$731	(\$731)	\$0	\$731
24 IT Services			\$444	\$444	(\$444)	\$0	\$444
25		10			ſ		
20 27							
28 OTHER							
Publication ¿	29 Publication and membership dues		\$921	\$921	(\$256)	\$665	\$1,586
30 Food for client meetings	int meetings		\$30	\$30	(\$30)	\$0	\$30
31 Outreach & Education	Education		\$91	\$91	(\$91)	\$0	\$91
32 Software & E 33	Software & Equipment Purchase (Case Mgmt Tool, Lexis Nexis)	gmt Tool, Lexis Ne	exis)		\$5,693	\$5,693	\$5,693
34		5				ľ	
TOTAL OPE	35 TOTAL OPERATING EXPENSE	I	\$22,571	\$22,571	(\$10,743)	\$11,828	\$34,399
36							
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APPENDIX A1

Effective July 1, 2015 to June 30, 2018

La Raza Centro Legal

Legal Services For Seniors

Purpose I.

The purpose of this grant is to ensure the rights and entitlements of older persons by providing or securing legal services.

II. Definitions

	California State Bar	The State Bar of California is the regulatory agency for the lawyers, charged with admitting and disciplining attorneys	
	DAAS	Department of Aging and Adult Services	
	Grantee	La Raza Centro Legal (LRCL)	
	HSA	Human Services Agency of City and County of San Franci	isco
	Legal Assistance	Legal advice and representation provided by an attorney to individuals with economic or social needs; and includes – extent feasible, counseling or other appropriate assistance paralegal or law student under the direct supervision of an and (ii) counseling or representation by a nonlawyer where by law. Direct legal assistance may be provided face-to-fac telephone, or by electronic communication and includes, b limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents at assistance.	(i) to the by a attorney; e permitted ce, by out is not ve
	OAA	Older Americans Act	
	Senior	Person who is 60 years or older.	
	SOGI	Sexual Orientation and Gender Identity, a result of Ordinar 159-16 which amended the San Francisco Administrative of require City departments and contractors that provide heal social services to seek to collect and analyze data concerni sexual orientation and gender identity of the clients they see (Chapter 104, Sections 104.1 through 104.9.)	Code to th care and ng the
za	Centro Legal	1	FY 2015-18

III. Target Population

The target population of this grant is individuals 60 years of age or older. According to the federal mandates of the Older Americans Act, services must target clients who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Limited English proficiency
- Minority
- Frail
- Lesbian/Gay/Bisexual/Transgender

IV. Eligibility for Legal Services

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

V. Location and Time of Services

Services are provided at 474 Valencia St., Suite 295, San Francisco, CA 94103. The hours of operation are from 10 a.m. to noon and from 1 p.m. to 4 p.m.

VI. Description of Services

The Legal Services program providers help eligible consumers with a variety of legal issues including benefit appeals, eviction prevention, consumer fraud/issues, elder abuse prevention, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters.

Legal services and intervention is critical to maintaining or securing a better quality of life affecting seniors and adults with disabilities. Legal service program providers work in conjunction with other service providers to carefully assess and triage consumer needs. In addition, Legal Service providers are expected to keep up with changes in the law that affect seniors and adults with disabilities, particularly in the issue areas in which services are provided.

Consumers contacting legal services go through an initial screening process. In general, senior legal providers categorize the service they give into the following four modules:

- 1. Information and Referral the consumer concern is more appropriately referred to another service for assistance.
- 2. Advise and Close the consumer issue is very easily addressed, advice is provided and the case is closed
- 3. Brief Services the consumer is in need of assistance to prepare legal correspondence, fill out an official form, review legal documents, etc.
- 4. Case Acceptance the consumer issue warrants more extensive legal

representation and a case file is opened, i.e., elder abuse, consumer fraud, challenging eviction petitions, etc.

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

Areas of expertise for Legal Service Grantees should include at least one of the following:

- a) Income/Nutrition (SSI, Social Security, Pensions/Retirement, CalFresh/Supplemental Nutrition Assistance Program (SNAP), Unemployment)
- b) Housing/Utilities (Tenant Rights, Real Property, Utilities)
- c) Long-term Care (SNF, Facility issues, Community-based, long-term care services)
- d) Healthcare (MediCal, Medicare, Managed care, Provider/services access, Private/Insurance)
- e) Protective Services/Elder Abuse/Defense against Conservatorship (Conservatorship issues with a focus on defending older persons against guardianship as called for in the OAA § 321(a)(6)), Restraining Orders, Abuse/neglect, Exploitation, Advanced Planning/Autonomy/advance directives
- f) Consumer (Bankruptcy/debt, Contracts/warranties, Scams/identity theft)
- g) Civil Rights (LEP Rights, Discrimination, Immigration)

Consumers can expect that the legal service provider is experienced and knowledgeable about working with an older adult population. Legal Service Providers should be as culturally and linguistically competent to serve an ethnically diverse population as possible.

The Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and the Office on the Aging to help develop and maintain a comprehensive citywide approach to legal service issues. The Grantee may also conduct special outreach activities and/or attends relevant community events for visibility and enabling collaborations.

VII. Service Objectives

On an annual basis:

- Grantee will serve <u>164</u> unduplicated consumers seniors and younger adults with disabilities.
- Grantee will provide <u>1963</u> units of service of legal assistance. A unit is one hour of legal assistance

VIII. Outcome Objectives

- 85% of consumers assisted in the above-listed areas of expertise will be satisfied with the service provided.
- 85% of consumers surveyed, consumers assisted with legal services (where a case is opened and closed), will be satisfied of the resolution provided by the legal counselor within the contract period.

IX. Reporting Requirements

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

- A. The grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- B. Monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system regarding the following:
 - 1. Number of unduplicated consumers 60 years of age and older served during the month.
 - 2. Number of units of legal assistance services provided during the month
- C. Grantee is responsible for completing the quarterly Legal Services Report required by the California Department of Aging and submitting to DAAS/OOA by the following Deadlines: 1st Quarter due October 28th; 2nd Quarter due January 28th, 3rd Quarter due April 28th and 4th Quarter due July 28th.
- D. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VII & VIII- Service and Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year on an annual basis:
 - The percentage of participants surveyed that have indicated excellent or good in rating the quality of services they received.
- E. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system.
- F. Grantee will provide an annual consumer satisfaction survey report to OOA by March 15 each grant year. 35% of consumers served will complete a satisfaction survey on an annual basis.
- G. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as requested by HSA. The due date for submitting the annual summary report is July 10th.
- H. Grantee shall develop and deliver ad hoc reports as requested by HSA.
- I. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.

J. 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:

> Michael Zaugg, Program Analyst (Worker # 4402) DAAS, Office on the Aging P.O. Box 7988 San Francisco, CA 94120 michael.zaugg@sfgov.org

Tahir Shaikh, Contract Manager (Worker # G410) Human Services Agency PO Box 7988 San Francisco, CA 94120 tahir.shaikh@sfgov.org

X. Monitoring Activities

- A. <u>Program Monitoring</u>: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA-Getcare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; program operation, which includes a review of a written policies and procedures manual of all OOA funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.
- B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, 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.

APPENDIX A2

Effective July 1, 2017 to June 30, 2018

La Raza Centro Legal

Legal Services for Younger Adults with Disabilities

I. Purpose

The purpose of this grant is to ensure the rights and entitlements of younger adults with disabilities by providing or securing legal services.

II. Definitions

California State Bar	The State Bar of California is the regulatory agency for the State's lawyers, charged with admitting and disciplining attorneys.
DAAS	Department of Aging and Adult Services
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments 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.
Grantee	La Raza Centro Legal (LRCL)
HSA	Human Services Agency of City and County of San Francisco
Legal Assistance	Legal advice and representation provided by an attorney to younger adults with disabilities with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a nonlawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro se assistance.
OAA	Older Americans Act
Senior	Person who is 60 years or older.

SOGI	Sexual Orientation and Gender Identity, a result of Ordinance No. 159-16 which amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9.)
Younger Adult With Disability	Person 18 years of age or older living with a disability.

III. Target Population

The target population of this grant is younger adults with disabilities, age 18 to 59. Services should target clients who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Limited English proficiency
- Minority
- Frail
- Lesbian/Gay/Bisexual/Transgender

IV. Eligibility for Legal Services

- 1) A resident of San Francisco
- 2) Aged 18 to 59 living with a disability*

*It will be a best practice to allow the consumer to self-identify to the extent possible. However, should there be a case where the consumer's disability status based solely on selfidentification is in question, additional verification may be requested. The Grantee will be permitted to ask the consumer to provide any one of the following items: a) Disabled Transit Identification card; b) Medi-Care card; c) Social Security Disability Insurance card, or, as a last resort, d) Medical verification.

V. Location and Time of Services

Services are provided at 474 Valencia St., Suite 295, San Francisco, CA 94103. The hours of operation are from 10 a.m. to noon and from 1 p.m. to 4 p.m.

VI. Description of Services

Legal Services program providers help eligible consumers with a variety of legal issues including benefit appeals, eviction prevention, consumer fraud/issues, elder abuse prevention, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters.

Legal services and intervention is critical to maintaining or securing a better quality of life affecting seniors and adults with disabilities. Legal service program providers work in conjunction with other service providers to carefully assess and triage consumer needs. In addition, Legal Service providers are expected to keep up with changes in the law that affect senior and adults with disabilities, particularly in the issue areas in which services are provided.

Consumers contacting legal services go through an initial screening process. In general, legal providers categorize the service they give into the following four modules:

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

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

Areas of expertise for Legal Service Grantees should include at least one of the following:

- a) Income/Nutrition (SSI, Social Security, Pensions/Retirement, CalFresh/Supplemental Nutrition Assistance Program (SNAP), Unemployment)
- b) Housing/Utilities (Tenant Rights, Real Property, Utilities)
- c) Long-term Care (SNF, Facility issues, Community-based, long-term care services)
- d) Healthcare (MediCal, Medicare, Managed care, Provider/services access, Private/Insurance)
- e) Protective Services/Elder Abuse/Defense against Conservatorship (Conservatorship issues with a focus on defending older persons against guardianship as called for in the OAA § 321(a)(6)), Restraining Orders, Abuse/neglect, Exploitation, Advanced Planning/Autonomy/advance directives
- f) Consumer (Bankruptcy/debt, Contracts/warranties, Scams/identity theft)
- g) Civil Rights (LEP Rights, Discrimination, Immigration)

Consumers can expect that the legal service provider is experienced and knowledgeable about working with an younger adult with disabilities population. Legal Service Providers should be as culturally and linguistically competent as possible to serve an ethnically diverse population.

The Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and the Office on the Aging to help develop and maintain a comprehensive

citywide approach to legal service issues. The Grantee may also conducts special outreach activities and/or attends relevant community events for visibility and enabling collaborations. The Legal Services program providers help eligible consumers with, but not limited to, benefit appeals, eviction prevention, consumer fraud/issues, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters.

VII. Service Objectives

On an annual basis:

- Grantee will serve a minimum of <u>49</u> unduplicated consumers (younger adults with disabilities).
- Grantee will provide a minimum of $\underline{492}$ units of service of legal assistance. A unit is one hour of legal assistance.

VIII. Outcome Objectives

- <u>85%</u> of consumers completing a survey will report that they were provided with information or assistance which helped resolve their legal issue
- <u>85%</u> of surveyed consumers who were assisted with legal services (where a case is opened and closed) will be satisfied with the resolution provided by the legal counselor within the contract period.

IX. Reporting Requirements

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

- A. The grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- B. Monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system regarding the following:
 - 1. Number of unduplicated consumers 18 years of age and older with a disability served during the month.
 - 2. Number of units of legal assistance services provided during the month.
- C. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system.
- D. Grantee will provide an annual consumer satisfaction survey report to OOA by March 15 each grant year. 35% of consumers will complete a satisfaction survey on an annual basis.

- E. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as requested by HSA. The due date for submitting the annual summary report is July 10th.
- F. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA.
- H. 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:

Michael Zaugg Director, Office on the Aging P.O. Box 7988 San Francisco, CA 94120-7988 michael.zaugg@sfgov.org

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

X. Monitoring Activities

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

disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

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13	Executive Director/Supervising Attorney	\$70,416	100%	13%	13%	\$6,836	\$6,836	\$2,761	\$6,213	\$8,974	\$22,646
14	Senior Law Coordinator	\$46,886	100%	78%	78.0%	\$38,857	\$38,857	\$36,777		\$36,777	\$114,491
15	Senior Law Legal Assistant	\$21,419	100%	98%	98.0%	\$19,635	\$19,635	\$20,999		\$20,999	\$60,269
16	Immigration Law Coordinator	\$56,457	100%	25%	25%	\$4,598	\$4,598	\$13,750		\$13,750	\$22,946
17	Immigration Law Legal Attorney	\$49,450	100%	10%	10%	\$4,933	\$4,933	\$0		\$0	\$9,866
18	Admin/Legal Assistant 1	\$49,286	100%	20%	20%	\$5,316	\$5,316	\$9,664		\$9,664	\$20,296
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25	TOTALS	\$337,069	7.00	2.81	2.81	\$80,175	\$80,175	\$83,951	\$22,502	\$106,453	\$266,803
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28	EMPLOYEE FRINGE BENEFITS	\$104,491				\$22,380	\$22,380	\$24,282	\$8,616	\$32.898	\$77.658
	TOTAL SALARIES & BENEFITS	\$362,870				\$102,555	\$102,555	\$108,233	\$31,118	\$139,351	\$344,461
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		Program Name: La Raza Centro Legal-Legal Services for Younger Adults with Disabilities (Same as Line 9 on HSA #1)		Expenditure Category	Rental of Property	Utilities(Elec, Water, Gas, Phone, Scavenger)	Office Supplies, Postage	Building Maintenance Supplies and Repair	Printing and Reproduction	18 Insurance	Staff Training	Staff Travel-(Local & Out of Town)	Rental of Equipment	CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE	Auditor	Finance Consultant	Computer Consultant Inditorial Convine		OTHER	Bar Dues	AILA (American Immigration Lawyers Association)	Senior Law Program Bulletin			TOTAL OPERATING EXPENSE		HSA #3	
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Appendix A-1

7/1/15-6/30/18 Legal Assistance to the Elderly Legal Services for Seniors

I. Purpose

The purpose of this grant is to ensure the rights and entitlements of older persons by providing or securing legal services.

II. Definitions

California State Bar	The State Bar of California is the regulatory agency for the State's lawyers, charged with admitting and disciplining attorneys.
DAAS	Department of Aging and Adult Services
Grantee	Legal Assistance to the Elderly (LAE)
HSA	Human Services Agency of City and County of San Francisco
Legal Assistance	Legal advice and representation provided by an attorney to older individuals with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a nonlawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro se assistance.
OAA	Older Americans Act
Senior	Person who is 60 years or older.
SOGI	Sexual Orientation and Gender Identity, a result of Ordinance No. 159-16 which amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9.)

III. Target Population

The target population of this grant is individuals 60 years of age or older. According to the federal mandates of the Older Americans Act, services must also target clients who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Limited English proficiency
- Minority
- Frail
- Lesbian/Gay/Bisexual/Transgender

IV. Eligibility for Senior Legal Services

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

V. Location and Time of Services

Services are provided at 701 Sutter St., 2nd floor, San Francisco, CA 94109. The hours of service are from 9:00 a.m. to 5:00 p.m.

VI. Description of Services

The Legal Services program providers help eligible consumers with a variety of legal issues including benefit appeals, eviction prevention, consumer fraud/issues, elder abuse prevention, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters.

Legal services and intervention is critical to maintaining or securing a better quality of life affecting seniors and adults with disabilities. Legal service program providers work in conjunction with other service providers to carefully assess and triage consumer needs. In addition, Legal Service providers are expected to keep up with changes in the law that affect senior and adults with disabilities, particularly in the issue areas in which services are provided.

Consumers contacting legal services go through an initial screening process. In general, senior legal providers categorize the service they give into the following four modules:

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

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

Areas of expertise for Legal Service Grantees should include at least one of the following:

- a) Income/Nutrition (SSI, Social Security, Pensions/Retirement, CalFresh/Supplemental Nutrition Assistance Program (SNAP), Unemployment)
- b) Housing/Utilities (Tenant Rights, Real Property, Utilities)
- c) Long-term Care (SNF, Facility issues, Community-based, long-term care services)
- d) Healthcare (MediCal, Medicare, Managed care, Provider/services access, Private/Insurance)
- e) Protective Services/Elder Abuse/Defense against Conservatorship (Conservatorship issues with a focus on defending older persons against guardianship as called for in the OAA § 321(a)(6)), Restraining Orders, Abuse/neglect, Exploitation, Advanced Planning/Autonomy/Advance Directives)
- f) Consumer (Bankruptcy/debt, Contracts/warranties, Scams/identity theft)
- g) Civil Rights (LEP Rights, Discrimination, Immigration)

Consumers can expect that the legal service provider is experienced and knowledgeable about working with an older adult population. Legal Service Providers should be as culturally and linguistically competent to serve an ethnically diverse population as possible.

The Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and the Office on the Aging to help develop and maintain a comprehensive citywide approach to legal service issues. The Grantee may also conducts special outreach activities and/or attends relevant community events for visibility and enabling collaborations.

VII. Service Objectives

On an annual basis:

- Grantee will serve <u>886</u> unduplicated consumers.
- Grantee will provide <u>6.378</u> units of service of legal assistance. A unit is one hour of legal assistance.

• Grantee will provide <u>_166</u> units of service of staffing hours to support the creation of a legal services newsletter as an effective outreach and educational tool. Each of the existing four (4) legal service providers will assign staff to help in the planning, development and distribution of this multi-lingual publication. Staffing hours will include but not be limited to: attending planning meetings, researching, writing, editing, and sending copy to be published, and distribution.

VIII. Outcome Objectives

- <u>85%</u> of consumers completing a survey will report that they were provided with information or assistance which helped resolve their legal issue
- <u>85%</u> of surveyed consumers who were assisted with legal services (where a case is opened and closed) will be satisfied with the resolution provided by the legal counselor within the contract period.

IX. Reporting Requirements

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

- A. The grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- B. Monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system regarding the following:
 - 1. Number of unduplicated consumers 60 years of age and older served during the month.
 - 2. Number of units of legal assistance services provided during the month
- C. Grantee is responsible for completing the quarterly Legal Services Report required by the California Department of Aging and submitting to DAAS/OOA by the following Deadlines: 1st Quarter due October 28th; 2nd Quarter due January 28th, 3rd Quarter due April 28th and 4th Quarter due July 28th.
- D. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VII & VIII- Service and Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year on an annual basis:
 - The percentage of participants surveyed that have indicated excellent or good in rating the quality of services they received.
- E. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system.
- F. Grantee will provide an annual consumer satisfaction survey report to OOA by March 15 each grant year. 35% of consumers served will complete a satisfaction survey on an annual basis
- G Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as requested by HSA. The due date for submitting the annual summary report is July 10th.

- H. Grantee shall develop and deliver ad hoc reports as requested by HSA.
- I. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- J. 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:

Michael Zaugg Director, Office on the Aging P.O. Box 7988 San Francisco, CA 94120-7988 michael.zaugg@sfgov.org

or

David Kashani Contract Manager Human Services Agency PO Box 7988 San Francisco, CA 94120-7988 david.kashani@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA-Getcare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; program operation, which includes a review of a written policies and procedures manual of all OOA-funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of directors list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool; translation and social services are based on staff hours.
- B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy

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

APPENDIX A-2

Effective July 1, 2017 to June 30, 2018

Legal Assistance to the Elderly

Legal Services for Younger Adults with Disabilities

I. Purpose

The purpose of this grant is to ensure the rights and entitlements of younger adults with disabilities by providing or securing legal services.

II. Definitions

California State Bar	The State Bar of California is the regulatory agency for the State's lawyers, charged with admitting and disciplining attorneys.
DAAS	Department of Aging and Adult Services
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments 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.
Grantee	Legal Assistance to the Elderly (LAE)
HSA	Human Services Agency of City and County of San Francisco
Legal Assistance	Legal advice and representation provided by an attorney to younger adults with disabilities with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a nonlawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro se assistance.
OAA	Older Americans Act
Senior	Person who is 60 years or older.

SOGI	Sexual Orientation and Gender Identity, a result of Ordinance No. 159-16 which amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9.)
Younger Adult With Disability	Person 18 years of age or older living with a disability.

III. Target Population

The target population of this grant is younger adults with disabilities, age 18 to 59. Services should target clients who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Limited English proficiency
- Minority
- Frail
- Lesbian/Gay/Bisexual/Transgender

IV. Eligibility for Legal Services

- 1) A resident of San Francisco
- 2) Aged 18 to 59 living with a disability*

*It will be a best practice to allow the consumer to self-identify to the extent possible. However, should there be a case where the consumer's disability status based solely on selfidentification is in question, additional verification may be requested. The Grantee will be permitted to ask the consumer to provide any one of the following items: a) Disabled Transit Identification card; b) Medi-Care card; c) Social Security Disability Insurance card, or, as a last resort, d) Medical verification.

V. Location and Time of Services

Services are provided at 701 Sutter St., 2nd floor, San Francisco, CA 94109. The hours of service are from 9:00 a.m. to 5:00 p.m.

VI. Description of Services

Legal Services program providers help eligible consumers with a variety of legal issues including benefit appeals, eviction prevention, consumer fraud/issues, elder abuse prevention, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters.

Legal services and intervention is critical to maintaining or securing a better quality of life affecting seniors and adults with disabilities. Legal service program providers work in conjunction with other service providers to carefully assess and triage consumer needs. In addition, Legal Service providers are expected to keep up with changes in the law that affect seniors and adults with disabilities, particularly in the issue areas in which services are provided.

Consumers contacting legal services go through an initial screening process. In general, legal providers categorize the service they give into the following four modules:

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

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

Areas of expertise for Legal Service Grantees should include at least one of the following:

- a) Income/Nutrition (SSI, Social Security, Pensions/Retirement, CalFresh/Supplemental Nutrition Assistance Program (SNAP), Unemployment)
- b) Housing/Utilities (Tenant Rights, Real Property, Utilities)
- c) Long-term Care (SNF, Facility issues, Community-based, long-term care services)
- d) Healthcare (MediCal, Medicare, Managed care, Provider/services access, Private/Insurance)
- e) Protective Services/Elder Abuse/Defense against Conservatorship (Conservatorship issues with a focus on defending older persons against guardianship as called for in the OAA § 321(a)(6)), Restraining Orders, Abuse/neglect, Exploitation, Advanced Planning/Autonomy/advance directives
- f) Consumer (Bankruptcy/debt, Contracts/warranties, Scams/identity theft)
- g) Civil Rights (LEP Rights, Discrimination, Immigration)

Consumers can expect that the legal service provider is experienced and knowledgeable about working with an older adult population. Legal Service Providers should be as culturally and linguistically competent as possible to serve an ethnically diverse population.

The Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and the Office on the Aging to help develop and maintain a comprehensive citywide approach to legal service issues. The Grantee may also conducts special outreach Legal Assistance to the Elderly 3

Younger Adults with Disabilities

Appendix A-2 FY17/18

activities and/or attends relevant community events for visibility and enabling collaborations. The Legal Services program providers help eligible consumers with, but not limited to, benefit appeals, eviction prevention, consumer fraud/issues, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters.

VII. Service Objectives

On an annual basis:

- Grantee will serve a minimum of <u>49</u> unduplicated consumers (younger adults with disabilities).
- Grantee will provide a minimum of <u>492</u> units of service of legal assistance. A unit is one hour of legal assistance.

VIII. Outcome Objectives

- <u>85%</u> of consumers completing a survey will report that they were provided with information or assistance which helped resolve their legal issue
- <u>85%</u> of surveyed consumers who were assisted with legal services (where a case is opened and closed) will be satisfied with the resolution provided by the legal counselor within the contract period.

IX. Reporting Requirements

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

- A. The grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- B. Monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system regarding the following:
 - 1. Number of unduplicated consumers 18 years of age and older with a disability served during the month.
 - 2. Number of units of legal assistance services provided during the month.
- C. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system.
- D. Grantee will provide an annual consumer satisfaction survey report to OOA by March 15 each grant year. 35% of consumers will complete a satisfaction survey on an annual basis.

- E. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as requested by HSA. The due date for submitting the annual summary report is July 10th.
- F. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA.
- H. 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:

Michael Zaugg Director, Office on the Aging P.O. Box 7988 San Francisco, CA 94120-7988 michael.zaugg@sfgov.org

David Kashani Contract Manager Human Services Agency PO Box 7988 San Francisco, CA 94120-7988 david.kashani@sfgov.org

X. Monitoring Activities

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

Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

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In-ford SZ-300	Drojact Incol	μ. Ευ		001.00						
Fund-Rating 48,100 46,705 52,338 16,668 16,668 16,668 16,668 16,668 16,668 16,668 16,668 16,668 16,668 16,668 16,703 39,971 30,971 30		16 96		nnc'ze	and the second		\$2,500	\$7,500		
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Total Revenues \$531,347 \$540,600 \$548,173 \$\$1500 \$40,625 \$618,298							1 22,311	018,916		
Full Time Equivalent (FTE) 6.70 6.70 6.70 0.06 7.33 Prepared by: Eric Ha Telephone No: 415-538-3333 4.15-538-3333 Date 91207		\$531,34		\$546.173	\$31.500	\$40.625.	S618 798	31 GOU 246		
Prepared by: Eric Ha Telephone No.: 415-538-3333 Telephone No.: 415-538-33	44 Full Time Equivalent (FTE)	6.7		6.70	an na	990	CC 1			
HSA-CO Review Signature:	Prenared hv. Fric Ha		Tolonhono No							
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Salaries & Benefits Detail Salaries & Benefits Detail Figures Legal Services Legal Services Colspan="6">Colspan="6">Colspan="6">Colspan="6">Colspan="6" Figures Legal Services Legal Services Legal Services Colspan="6">Colspan="6" Figures Legal Services Legal Services Colspan="6" Colspan="6" Figures Salary Services Colspan="6" Colspan="6" Figures Salary Services Colspan="6" Colspan="6" Figures Salary Services Salary Services Colspan="6" Figures Salary Services Colspan="6" Figures <th colspa<="" td=""><td></td><td></td><td></td><td></td><td></td><td>bocument l</td><td>Appendix B-1, Date:</td><td>Page 2</td><td></td><td></td><td></td><td></td><td></td><td>9/22/2017</td></th>	<td></td> <td></td> <td></td> <td></td> <td></td> <td>bocument l</td> <td>Appendix B-1, Date:</td> <td>Page 2</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>9/22/2017</td>						bocument l	Appendix B-1, Date:	Page 2						9/22/2017
File Legal Services Legal Services Legal Services Legal Services Modification Modification<			Salaries 8	t Benefit	s Detail										
FTIRF ADDITILE TERM TITIT ABJOING TITIT ABJOING <th></th> <th>Legal</th> <th>Services</th> <th>Legal 5</th> <th>Services</th> <th>Legal 5</th> <th>ervices</th> <th>Modifi Salary/R</th> <th>cation stention</th> <th>Modifi Young . Wibisat</th> <th>cation Aduits silities</th> <th>revi</th> <th>sed</th> <th>TOTAL</th>		Legal	Services	Legal 5	Services	Legal 5	ervices	Modifi Salary/R	cation stention	Modifi Young . Wibisat	cation Aduits silities	revi	sed	TOTAL	
CHECTORE 0.000 580.314 0.700 581.486 1.000 581.486 1.000 581.486 1.000 581.486 0.0461 5723 0.047 5723 0.047 5723 0.047 5723 0.047 5723 0.040 581.486 1.000 581.486 1.000 581.486 1.000 581.486 0.046 582.033 0.040 583.633 0.046 583.633 0.046 583.633 0.046 583.633 0.046	POSITION TIFLE	LL.	5-6/30/16 SALARIES	7/1/16 FTE	6/30/17 SALARIES	117-	6/30/18 SALARIES	FTE	SALARIES	71117-6	SIJ0/18 SALARIES	1	6/30/18 SALARIES	7/1/15-6/30/18	
STAFF ATTORNEY #1 1000 569.360 1000 567.350 1000 567.350 1000 567.350 1000 567.350 1000 567.350 0.000 577.3 0.000 577.3 0.000 577.3 0.000 557.350 5.000 5.0000 5.0000 5.0000 5.0000 5.0000 <td></td> <td>0.900</td> <td>\$69,214</td> <td>006.0</td> <td>\$70,944</td> <td></td> <td>\$70,944</td> <td>(0.051)</td> <td></td> <td></td> <td></td> <td></td> <td>\$70,944</td> <td>\$211.102</td>		0.900	\$69,214	006.0	\$70,944		\$70,944	(0.051)					\$70,944	\$211.102	
STRF ATTORNEY #4 1000 \$53.205 1000 \$53.503 1000 \$53.503 1000 \$53.603 \$50.003 \$	STAFF ATTORNEY	1.000	\$59,988	1.000	\$61,488	1.000	\$61,488		\$12,203			1.000	\$73,691	\$195,167	
STAFF ATTORNEY #5 0 500 \$25,071 0 500 \$25,071 0 500 \$25,067 0 500 \$25,066 0 500 50,007 50,066 \$25,066 0 700 <t< td=""><td></td><td>1.000</td><td>\$52,325</td><td>1.000</td><td>\$53,633</td><td>1.000</td><td>\$53,633</td><td>(0.200)</td><td>\$772</td><td></td><td></td><td>D.800</td><td>\$54,405</td><td>\$160,363</td></t<>		1.000	\$52,325	1.000	\$53,633	1.000	\$53,633	(0.200)	\$772			D.800	\$54,405	\$160,363	
PRALEGAL #2 0.500 \$20.902 0.500 \$20.902 0.500 50.902 0.700 50.902 0.700 50.902 0.700 50.902 0.700 50.903 0.701 0.701 90.901 0.701 0.701 90.901 0.701 0.701 90.901 0.701 0.701 90.901 0.701 0.701 90.901 0.701 0.701 90.901 0.701 0.701 90.901 0.701 0.701 90.901 0.701 90.901 0.701 90.901 0.701 90.901 0.701 90.901 0.701 90.901 0.701 90.90	STAFF ATTORNEY	0.500	\$25,373	0.500	\$26,007	0.500	\$26,007	0.006	\$5,892	0.037	\$2,366	0.543	\$34,265	\$85,645	
PARALEGAL #3 0 720 \$29.671 0 720 \$39.413 0 720 \$61.767 \$17.677 <th< td=""><td></td><td>0.550</td><td>\$20,295</td><td>0.550</td><td>\$20,802</td><td>0.550</td><td>\$20,802</td><td>0.160</td><td>\$8,064</td><td></td><td></td><td>0.710</td><td>\$28,856</td><td>\$69,953</td></th<>		0.550	\$20,295	0.550	\$20,802	0.550	\$20,802	0.160	\$8,064			0.710	\$28,856	\$69,953	
STAFF ATTORNEY #5 I	PARALEGAL #3	0.720	\$29,671	0.720	\$30,413	0.720	\$30,413	0,162	\$1,757			0.882	\$32,170	\$92,254	
STAFF ATTORNEY #7 0 0 513 586 0 0 513 586 0 0 513 586 0 0 513 586 0 0 513 586 0 0 513 586 0 0 513 586 0 0 513 586 0 0 513 586 0 0 513 5866 0 513 586	STAFF ATTORNEY									0.267	\$13,598	0.267	\$13,598	\$13,598	
TOTALS 4 670 \$256,6 866 4 670 \$263,267 4 670 \$263,267 4 670 \$263,267 5 500 </td <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>0.252</td> <td>\$13,938</td> <td>0.252</td> <td>\$13,938</td> <td>\$13,938</td>										0.252	\$13,938	0.252	\$13,938	\$13,938	
TOTALS 4 670 \$256,366 4 670 \$263,387 4 670 \$263,287 4 670 \$263,287 4 670 \$263,287 6 670 \$263,287 6 670 \$263,287 6 670 \$263,287 6 670 \$263,287 6 670 \$263,287 6 670 \$263,287 6 670 \$263,287 5 6 212 2 1 4% \$56,212 2 1 4% \$56,212 2 1 4% \$56,212 2 1 4% \$56,212 2 1 4% \$56,212 2 1 4% \$56,212 2 1 4% \$56,212 2 1 4% \$56,212 2 1 4% \$56,212 2 1 4% \$51,990 \$54,496 1 9 7% \$5 TOTAL OCA SALARIES & BENETTS 2 1 7% \$51,297 2 1 4% \$51,992 2 1 99 \$51,592 2 1 99 \$54,792 \$54,966 1 9 7% \$5 NON-OCA FORMON TITLE 5 1 5 000 \$53,1500 \$53,1500 \$54,398 \$54,398 0 600 \$54,398 0 600 \$54,398 \$54,398 \$54,398 \$50,798 \$54,398 \$50,798 \$54,398 \$54,398 \$54,398 \$54,398															
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EMPLOYEE FRINCE BENEFITS 21,7% \$55,71 21,4% \$56,212 21,4% \$56,212 38% \$2,822 15,0% \$4,466 19,7% TOTAL OCA SALARIES & BENEFITS 23,12,567 \$319,499 \$319,499 \$319,499 \$319,499 \$315,469 \$31,500 \$54,308 10,7% NOUN-OCA POSITION TITE 53,12,567 \$319,499 \$319,499 \$319,499 \$319,499 \$319,499 \$319,499 \$31,499 <td></td> <td>4.670</td> <td>\$256,866</td> <td>4.670</td> <td>\$263,287</td> <td>4.670</td> <td>\$263,287</td> <td>2.10.0</td> <td>\$28,678</td> <td>0.556</td> <td>\$29,902</td> <td>5.303</td> <td>\$321,867</td> <td>\$842,020</td>		4.670	\$256,866	4.670	\$263,287	4.670	\$263,287	2.10.0	\$28,678	0.556	\$29,902	5.303	\$321,867	\$842,020	
EMPLOYEE FRINCE BENEFITS 21.7% \$56,721 21.4% \$56,212 21.4% \$56,212 21.4% \$56,212 21.4% \$56,212 21.4% \$56,212 21.4% \$56,212 21.4% \$56,212 21.4% \$51,200 \$51,400 10.7% \$51,400 \$51,400 \$51,400 10.7% \$51,400 \$51,400 \$51,400 \$51,400 \$51,400 \$51,700 \$51,400 \$51,700 \$51,700 \$51,700 \$															
TOTAL OCA SALARIES & BENEFITS \$312,567 \$319,499 \$319,499 \$319,499 \$319,499 \$319,499 \$319,499 \$31,500 \$34,368 \$10,000 \$34,368 \$10,500 \$34,368 \$10,500 \$34,368 \$10,500 \$34,368 \$10,500 \$30,5268 \$10,500 \$30,5268 \$10,500 \$30,5268 \$10,500 \$30,528 \$10,500 \$30,528 \$10,500 \$30,529 \$10,500 \$30,529 \$10,500 \$30,529 \$10,500 \$30,529 \$10,500 \$30,529 \$10,500 \$30,529 \$20,300 <	EMPLOYEE FRINGE BENEFITS	21.7%	\$55,721	21.4%	\$56,212	21.4%	\$56,212	9.8%	\$2,822	15:0%	\$4,496	19.7%	\$63,530	175,463	
IOTAL ODA SALANLES & BENEFITS \$312,587 \$319,499 \$319,419 \$319,				-					ALCONTRACTOR						
NON-COA POSITION TITLE NON-COA POSITION TITLE 0.500 \$23,588 0.500 \$23,588 0.500 \$23,588 0.500 \$23,588 0.500 \$23,588 0.500 \$23,588 0.500 \$23,588 0.500 \$23,588 0.6500 \$23,588 0.6500 \$23,588 0.6500 \$23,588 0.6500 \$23,588 0.6500 \$23,575 0.080 \$33,975 0.0450 \$100 \$16,586 1.000 \$10,000	TOTAL OOA SALARIES & BENEFITS		\$312,587		\$319,499		\$319,499		\$31,500		\$34,398		\$385,397	\$1,017,483	
STAFF ATTORNEY #5 0.600 \$23,588 0.500 \$23,588 0.500 \$23,588 0.500 \$23,588 0.500 \$20,588 0.500 \$20,508 0.650 \$20,508 0.650 \$20,598 0.650 \$20,598 0.650 \$23,575 0.680 \$23,575 0.680 \$23,575 0.680 \$23,575 0.680 \$23,575 0.680 \$23,575 0.680 \$23,575 0.680 \$23,575 0.680 \$23,575 0.680 \$23,575 0.680 \$23,575 0.680 \$23,575 0.680 \$23,575 0.680 \$23,575 0.680 \$23,575 0.680 0.640 VOLUNTEERS (RECEPTIONIST) 1,000 \$16,868 1,000 \$10,00 \$16,979 2,030<	T NON-NON														
PARALEGAL #2 0.450 \$15,298 0.450 \$15,298 0.450 \$15,298 0.450 \$15,298 0.450 \$15,298 0.450 \$15,298 0.450 \$15,298 0.450 \$15,298 0.450 \$15,298 0.450 \$15,298 0.450 \$15,298 0.080 \$3,375 0.080 \$3,375 0.080 \$3,375 0.080 \$3,375 0.080 \$3,375 0.080 \$3,375 0.080 \$3,375 0.080 \$3,375 0.080 \$3,375 0.080 \$3,375 0.080 \$3,375 0.080 \$3,375 0.080 \$3,375 0.080 \$3,375 0.080 \$3,375 0.080 \$3,375 0.080 \$3,375 0.080 \$3,375 0.080 \$3,375 0.080 100	STAFF ATTORNEY #5	0.500	\$23.588	0.500	\$73 588	0 500	\$73 588					0 600	000 COD		
PARALECAL #3 0.080 \$3.375 0.080 \$3.375 0.080 \$3.375 0.080 \$3.375 0.080 \$3.976 0.080 2.030 \$3.9729 2.030 \$3.9729 2.030 \$3.9729 2.030 \$3.9729 2.030 \$3.9729 2.030 \$3.9729 2.030 \$3.9729 2.030 \$3.9729 2.030 \$3.9729 2.030 \$3.9729 2.030 \$3.9729 <td>PARALEGAL #2</td> <td>0.450</td> <td>\$15,298</td> <td>D.450</td> <td>\$15,298</td> <td>0.450</td> <td>\$15,298</td> <td></td> <td></td> <td></td> <td></td> <td>0.450</td> <td>\$15,298</td> <td>\$10,104</td>	PARALEGAL #2	0.450	\$15,298	D.450	\$15,298	0.450	\$15,298					0.450	\$15,298	\$10,104	
VOLUNTEERS (RECEPTIONIST) 1.000 \$16,868 1.000 \$16,868 1.000 \$16,868 1.000 \$16,868 1.000 \$16,868 1.000 \$16,868 1.000 \$16,868 1.000 \$16,868 1.000 \$16,868 1.000 \$16,868 1.000 \$16,868 1.000 \$16,868 1.000 \$16,868 1.000 \$1000 \$100 \$1000		0.080	\$3,975	0.080	\$3,975	0.080	\$3,975					0.080	\$3.975	11 925	
TOTALS 2.030 \$59,729 2.030 \$59,729 2.030 \$59,729 2.030 EMPLOYEE FRINGE BENEFITS 18.4% \$11,015 18.4% \$11,015 18.4% \$11,015 18.4% 18.4% 2.030 TOTAL NON-OOA SALARIES & BENEFITS \$70,744 \$70,744 \$70,744 \$70,744 \$70,744 \$70,744	VOLUNTEERS (RECEPTION	1.000	\$16,868	1.000	\$16,868	1.000	\$16,868					1.000	\$16,868	\$50,604	
TOTALS 2.030 \$59,729 2.030 \$59,729 2.030 \$59,729 2.030 \$59,729 2.030															
IOTALS Z.030 \$59,729 Z.030 \$59,729 Z.030 Z.031 Z.031 Z.031 Z.030 Z.031 Z.031 Z.030 Z.031 Z.031 <thz.04< th=""> Z.031 <thz.04< th=""> <t< td=""><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></t<></thz.04<></thz.04<>															
EMPLOYEE FRINGE BENEFITS 18.4% \$11,015 18.4% \$11,015 18.4% \$11,015 18.4% \$11,015 18.4% 10.4% <th10.4%< th=""> 10.4% 10.4%</th10.4%<>		2.030	427, FC4	050.2	67/60%	2.030	\$59,729					2.030	\$59,729	\$179,187	
TOTAL NON-OOA SALARIES & BENEFITS \$70,744 \$70,		18.4%	\$11,015	18.4%	\$11,015	18.4%	\$11,015					18.4%	\$11,015	\$33,045	
TOTAL NON-OOA SALARIES & BENEFITS \$70,744 \$70,						-			L				-		
TOTAL SALARIES & RENFEITS 6 700 \$383 331 6 700 \$380 343 6 700 \$300 343 6 700 500 543 500 545	TOTAL NON-OOA SALARIES	FITS	\$70,744		\$70,744		\$70,744						\$70,744	\$212,232	
	TOTAL SALARIES & BENEFITS	6.700	\$383,331	6.700	\$390,243	6.700	\$390,243	0.077	\$31,500	0.556	\$34,398	7.333	\$456,141	\$1,229,715	

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1-2-6						Appendix B-1, Page 3 Document Date;	9/22
4 5 6	Contractor's Name: Legal Assistance to The Elderly						
		Operating Expense Detail	letail				
σÇ	OOA Emmodifying Colorado	Legal Services	Legal Services	Legal Services	Modifications	revised	TOTAL
2 1	Con Experimente Caregory Rental of Property		\$51,456	\$51,456		//1/1/-6/30/18 \$51,456	\$151.061
12	Telephone	\$6,400	\$6,400	\$6,400		\$6,400	\$19,200
13	Office Supplies, Postage	\$6,200	\$6,200	\$6,200		\$6,200	\$18,600
14	Maintenance Supplies and Repair	\$200	\$458	\$458		\$458	\$1,116
15	Printing and Reproduction	\$1,200	\$1,200	\$1,200		\$1,200	\$3,600
16	Insurance	\$7,200	\$7,200	\$7,200		\$7,200	\$21,600
17	Staff Travel (local) & Training	\$1,250	\$1.250	\$1,250		\$1,250	\$3,750
18	Law Library	\$3,650	\$3,650	\$3,650		\$3,650	\$10,950
19	Membership/Dues	\$500	\$500	\$500		\$500	\$1,500
20	Rental of Equipment	\$2,300	\$2,300	\$2,300		\$2,300	\$6,900
21	CONSULTANT/SUBCONTRACTOR			k JI			
ន	Senior Right Bulletin	\$4,500	\$4 500	\$4 500		\$4 500	\$13 EDD
5						00011-0	202.2
25 26	OTHER Volunteer Expenses (Receptionist/intake)	\$1,100	\$1,100	\$1,100		\$1.100	\$3.300
27		\$1,228	\$1,228	\$1,228		\$1,228	\$3,684
28	Utilities Instantial canaira & cuminas	\$1,200	51,200	\$1,200		\$1,200	\$3,600
3 8		000/14	000.44	\$4,0UU		\$4,800	\$14,400
31	TOTAL OOA OPERATING EXPENSE	\$69,877	\$93,442	\$93,442	20	\$93,442	\$276,761
32							
8							
34	Rental of Property	\$17,754	\$16,410	\$21,983		\$21,983	\$56,147
35		\$1,500	\$1,500	\$1,500		\$1,500	\$4,500
36	Office Supplies, Postage	\$500	\$500	\$500		\$500	\$1,500
37	Printing and Reproduction	\$1,500	\$1,500	\$1,500		\$1,500	\$4,500
38		\$1,300	\$1,300	\$1,300		\$1,300	\$3,900
39	Law Library	\$4,000	\$4,000	\$4,000		\$4,000	\$12,000
40		\$100	\$100	\$100		\$100	\$300
41	Rental of Equipment	\$300	\$300	\$300		\$300	\$900
42	Voturteer Expenses (Receptionist/Intake)	\$250	\$250	\$250		\$250	\$750
43	Client Costs	\$7,500	\$7,500	\$7,500		\$7,500	\$22,500
44	Maintenance Supplies and Repair	\$2,000	\$2,000	\$2,000		\$2,000	\$6,000
45 46							
47							
48	TOTAL NON-OOA OPERATING EXPENSE	\$36,704	\$35,360	\$40,933	05	\$40,933	\$112,997
<u>8</u> 2	TOTAL OPERATING EXPENSE	\$126,581	\$128,802	\$134,375	\$0	\$134,375	\$389,758
5	2# VSH						
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