City and County of San Francisco



Mark Farrell, Mayor

Human Services Agency

Department of Human Services Department of Aging and Adult Services Office of Early Care and Education

Trent Rhorer, Executive Director

MEMORANDUM

TO:	AGING & ADULT SERVICES COMMISSION						
THROUGH:	SHIREEN MO	CSPADDE	N, EXECU	JT	IVE DIRECTOR		
FROM:	CINDY KAUFFMAN, DEPUTY DIRECTOR JOHN TSUTAKAWA, DIRECTOR OF CONTRACTS						
DATE:	MAY 2, 2018						
SUBJECT:	NEW GRANT: LEGAL ASSISTANCE TO THE ELDERLY (NON-PROFIT) TO PROVIDE LEGAL ASSISTANCE AND LIFE PLANNING LEGAL SERVICES						
GRANT TERM:	4/1/18 - 6/30/	20					
GRANT AMOUNT:	New \$467,831	Contingency \$46,783		Total \$514,614			
ANNUAL AMOUNT:	See table below						
	<u>County</u>	State	Federal		Contingency	Total	
FUNDING: PERCENTAGE:	\$467,831 100%				\$46,783	\$514,614 100%	

The Department of Aging and Adult Services (DAAS) requests authorization to enter into two new grant agreements with Legal Assistance to the Elderly (LAE) for the period of April 1, 2018 to June 30, 2020, in the amount of \$467,831 plus a 10% contingency for a total amount not to exceed \$514,614. The purpose of the grants is to provide Legal Assistance and Life Planning Legal Services to older adults and adults with disabilities.

Program	Annual Amount	FY 4/1/18- 6/30/20	Contingency	Not to Exceed
Health-Related Law	\$125,000	\$290,322	\$29,032	\$319,354
LGBT Life Planning	\$75,000	\$177,509	\$17,751	\$195,260
Total	\$200,000	\$467,831	\$46,783	\$514,614

Background

On November 8, 2016 the voters of the City and County of San Francisco passed Proposition I that established the Dignity Fund to ensure the health and well-being of seniors and adults with disabilities. The fund is administered by the Department of Aging and Adult Services (DAAS) solely to help seniors and adults with disabilities secure and utilize the necessary services and support to live with dignity in their own homes and communities. The City Charter Amendment for the Fund established an eleven (11) member Oversight and Advisory Committee (OAC) to monitor and support the administration of the Dignity Fund. The OAC is responsible for developing recommendations for DAAS regarding services to seniors and adults with disabilities that are supported by the Fund. DAAS is committed to the defined goals in the City Charter and with input from the OAC developed an allocation plan based on known areas of need for seniors and adults with disabilities.

This allocation plan contained a legal services initiative that included funding for legal support related to healthcare issues for older adults and adults with disabilities to ensure that their rights and entitlements related to health services are maintained and accessed when appropriate. Health services are vital to older adults and adults with disabilities and often provide the assistance necessary to support older adults and adults with disabilities to live as independently as possible in the community and within safe and supportive environments with dignity and choice.

The legal services initiative also contained funding for legal service program focused on lifeplanning services delivered by a designated community based organization and with the intent of increasing LGBT older adults and adults with disabilities, particularly those who are frail and/or isolated, access to life planning legal services. This specific service initiative stemmed from The San Francisco LGBT Aging Policy Task Force 2014 publication that revealed that many LGBT older adults and adults with disabilities lacked basic life planning documents and that these populations desired to have such documents in a legally-binding format to ensure that their wishes and decisions are honored in the event that they are unable to do so and/or upon their death.

Services to be Provided

Legal Services Program for Health-Related Law

Grantee will provide Legal Assistance to older adults and adults with disabilities presenting with legal issues pertaining to health care and/or access to health care related services. This may include health insurance coverage denials, Medicare/Medi-cal overpayments, inappropriate hospital or rehabilitation center discharges, and other related issues. Grantee will develop and execute Memorandums of Understanding with the local HICAP (Health Insurance Counseling and Advocacy Program) and Long-Term Care Ombudsman programs to increase awareness of legal program services and facilitate efficient referral of clients between the three programs. For more specific information regarding the service objectives, including the type and number of service units, outcome objectives, and budget, please refer to attached Appendices A and B for the Legal Service Program for Health Related Law.

Life Planning Legal Service Program for LGBT Older Adults and Adults with Disabilities The Grantee will assist consumers in completing and executing legally recognized life planning documents. The Grantee will provide guidance regarding Life Planning Document(s) that best meet a consumer's expressed need and will conduct outreach and consumer education targeting the LGBT community about Life Planning Documents. For more specific information regarding the service objectives, including the type and number of service units, outcome objectives, and budget, please refer to attached Appendices A2 and B2 for the Life Planning Legal Service Program for LGBT Older Adults and Adults with Disabilities.

Performance

These are new grants for both Legal Assistance to the Elderly and DAAS. There is no monitoring history specific for these programs to report at this time. Legal Assistance to the Elderly is a current DAAS contractor and in compliance with performance and monitoring requirements for all other DAAS contracts. They were last monitored in June 2017.

Selection

Grantee was selected through Request for Proposal #771, which was competitively bid in November 2017.

Funding

Funding for this grant is provided by County General Funds, specifically the Dignity Fund.

ATTACHMENTS

Appendix A – Services to be Provided – Health-Related Law Appendix B – Budget Summary – Health-Related Law Appendix A-2 – Services to be Provided – LGBT Life Planning Appendix B-2 – Budget Summary – LGBT Life Planning

APPENDIX A - SERVICES TO BE PROVIDED BY GRANTEE

LEGAL ASSISTANCE TO THE ELDERLY

DIGNITY FUND

LEGAL SERVICE PROGRAM FOR HEALTH-RELATED LAW

April 1, 2018 – June 30, 2020

I. Purpose

The purpose of this grant is to provide legal assistance to older adults and adults with disabilities living in the City and County of San Francisco concerning health care and/or health care related services in order to maintain and/or access health care and related services.

II. Definitions

Adult with Disabilities	Person 18 years of age or older living with a
	disability/disabilities
CA.GetCare	A web-based application that provides specific functionalities
	for contracted agencies to use to perform consumer
	intake/assessment/enrollment, record service objectives, run
	reports, etc.
California State Bar	The State Bar of California is the regulatory agency for the
	state's lawyers, charged with admitting and disciplining
	attorneys
CARBON	Contracts Administration, Reporting and Billing On Line
	System
City	City and County of San Francisco, a municipal corporation.
Consumer /	An Older Adult and/or Adult with Disabilities enrolled in the
Unduplicated Consumer	Legal Service Program for Health-Related Law
Controller	Controller of the City and County of San Francisco or
	designated agent
DAAS	Department of Aging and Adult Services
Dignity Fund	The City and County of San Francisco, City Charter,
	Sections 16.128-1 through 16.128-12. Monies in the Fund
	shall be used to expend by DAAS solely to help seniors and
	adults with disabilities secure and utilize the services and
	support necessary to age with dignity in their own homes and
	communities.
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.
Education	Preparation and presentation of information designed to educate the target populations on life planning documents, health care benefits, rights, and advocacy services available to them. Time spent in delivery of this service will include preparation and travel time.
Frail	An older individual is determined to be functionally impaired because the individual either: (a) Is unable to perform at least two activities of daily living, including bathing, toileting, dressing, feeding, transferring and mobility and associated tasks, 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 older individual behaves in a manner that poses a serious health or safety hazard to the individual or to others.
Fund	Dignity Fund
Grantee	Legal Assistance to the Elderly (LAE)
HSA	San Francisco Human Services Agency
Legal Assistance/ Legal Services	Legal advice, and representation provided by an attorney to older adults and/or adult with disabilities with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a non-lawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro se assistance.
LGBT	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self- identify their income status, not to be used as a means test to qualify for the program.
Minority	Defined by race, ethnicity, religion, sexual orientation, and/or gender identity

OCM	Office of Contract Management, Human Services Agency
OOA	Office on the Aging
Older Adult	Person who is 60 years of age or older; used interchangeably with "Senior"
Outreach	Formal and informal approaches used to engage the target population(s). Formal approaches can include, but are not limited to, one to one contact and/or working with a community collaborative group. Informal approaches can include, but are not limited to, designated grantee employee being present and available in community spaces (i.e. community centers).
Senior	Person who is 60 years of age or older; used interchangeably with the "Older Adult"
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159- 16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve. (Chapter 104, Sections 104.1 through 104.9.)

III. Target Population

The target population of this grant is individuals ages 18 to 59 living with a disability and/or individuals 60 years of age or older. 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 Services

- 1) A resident of San Francisco
- 2) Aged 60 + or
- 3) Aged 18 to 59 living with a disability

V. Location and Time of Services

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

3

VI. Description of Services

Legal services can be critical to maintaining or securing a better quality of life for older adults and adults with disabilities. Through legal assistance, clients are able to assert their rights in order to maintain current benefits or access new benefits critical to their health and well-being. Services delivered under this contract will include the following:

1) The Grantee will assist eligible consumers with a variety of legal issues pertaining to health care and/or health care related services to the extent covered by health-related laws. The health-related law legal service program will include, but is not limited to, legal assistance pertaining to the following:

- Denial of coverage and share of cost assessments for Medicare/Medi-cal and private health insurance policies
- Medicare/Medi-cal overpayments especially those that threaten coverage, a consumer's ability to live independently or where housing is at risk
- Denial of Paratransit/Medical Transportation benefits
- Inappropriate hospital or rehabilitation facility discharge
- General health and benefit rights
- Other areas as determined in need and approved by DAAS

2) Clients needing legal services will go through an initial screening process. Grantee will categorize the service they give into the following four service types:

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

<u>Advise and Close</u> – the client issue is very easily addressed, advice is provided and the case is closed

<u>Brief Services</u> – the client is in need of assistance to prepare legal correspondence, fill out an official form, review legal documents, etc.

<u>Case Acceptance</u> – the client issue warrants more extensive legal representation and a case file is opened

3) Grantee is 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. Grantee should be prepared to serve a diverse population.

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

5) 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.

6) The Grantee will establish and maintain partnerships and mutually beneficial communication with community organizations, health clinics, City departments, and other relevant legal aid providers and organizations with the intent of reaching the target population and to ensure a streamlined referral process for consumers between programs as appropriate. The Grantee will develop Memorandum of Understandings (MOUs) with the local organizations that provide the Health Insurance Counseling and Advocacy (HICAP) and Long-Term Ombudsman programs.

7) The Grantee will keep current with health-related laws, rules, and regulations that have a potential impact on the older adult and adult with disabilities population.

8) The Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) and other security and privacy rules and regulations as applicable.

VII. Service Objectives

On an annual basis, the Grantee will meet the following Service Objectives:

For FY 17/18:

Grantee will enroll and provide Legal Assistance to $\underline{12}$ unduplicated consumers

Grantee will provide a minimum of $\underline{276}$ hours of Legal Assistance pertaining to health care or health care related services

For FY18/19:

Grantee will enroll and provide Legal Assistance to 150 unduplicated consumers

Grantee will provide a minimum of $\underline{1728}$ hours of Legal Assistance pertaining to health care or health care related services.

For FY 19/20:

Grantee will enroll and provide Legal Assistance to 150 unduplicated consumers

Grantee will provide a minimum of $\underline{1728}$ hours of Legal Assistance pertaining to health care or health care related services.

VIII. Outcome Objectives

Completion and submission of the following reports will be used to measure the amount, range, and impact of services provided.

- 1. Grantee will, on a quarterly basis, provide a report summarizing the following:
 - a. Total number of cases closed during the quarter.
 - b. Description of level of service for each case closed during the quarter (Information and Referral, Advise and Close, Brief Service, Case Acceptance).
 - c. Recording of each case closed into standardized categories based on legal issue assisted with (e.g. Inappropriate Hospital Discharge, Insurance Coverage Denial).
- 2. Grantee will, on a twice yearly basis (December and June), provide a report categorizing each case closed during the previous 6 months into a series of standardized categories based on the outcome of the closed case (e.g. Obtained or preserved eligibility under publicly funded health insurance, Increased access to health services, etc.).

Collecting outcomes through this manner will allow DAAS and Grantee to track positive outcomes in a year (and in turn to measure the value of a program) as well as comparing the outcomes from year to year. As this is the first contract utilizing these outcome measures, result may help to establish benchmarks for performance in future years.

3. Grantee will, on an annual basis, provide a narrative report summarizing legal trends presented by client base, obstacles, and successes the program experienced during the quarter.

IX. Reporting Requirements

- 1. The Grantee will track and record the units of service received by enrolled consumers in CA GetCare by the 5th working day of the month for the preceding month.
- 2. The Grantee will enter monthly reports into the CARBON database system which includes number of enrolled consumers and hours of services provided.
- 3. The Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VI & VII. This report will also include accomplishments and challenges encountered by the Grantee.
- 4. The 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 in the CARBON system. Additional reports may be requested and required at other points during the fiscal year.
- 5. 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.

- 6. The Grantee shall develop and deliver an annual summary report of SOGI data collected in each grant year as requested by DAAS/HSA. The due date for submitting the annual summary report is no later than July 10 each grant year.
- 7. The Grantee shall develop and deliver ad hoc reports as requested by HSA and/or DAAS.

For assistance with reporting requirements or submission of reports, contact:

Rocio Duenas <u>Rocio.Duenas@sfgov.org</u> Contract Manager Office of Contract Management

and

Michael Zaugg <u>Michael.Zaugg@sfgov.org</u> Director, Office on the Aging Department of Aging and Adult Services

X. Monitoring Activities

- 1. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; consumer eligibility and any targeted mandates, back up documentation for the units of service and all reporting including the log of service units which is based on the service provision hours; sign-in sheets of consumers who participated in services, and progress of service and outcome objectives; how consumer 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 Security Awareness Training; program operation, which includes a review of a written policies and procedures manual of all DAAS 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; a board of director list and whether services are provided appropriately according to Sections IV, V, VI, and VII.
- 2. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

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41 Other Grants (MOCD, IOLTA, EQAC) Image: Constant of the second s			\$156	\$623	\$623	\$1,402					
43 Total Revenues \$40,478 \$125,623 \$125,623 \$291,724 44 Full Time Equivalent (FTE) 1.25 1.25 1.25 1.25 46 Prepared by: Eric Ha Telephone No.: 415-538-3333 Date 04/17/2018 47 HSA-CO Review Signature:											
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44 Full Fille Equivalent (FE) 46 Prepared by: Eric Ha 47 HSA-CO Review Signature: 48 HSA #1	43	Total Revenues	\$40,478	\$125,623	\$125,623	\$291,724					
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48 HSA #1	46	Prepared by: Eric Ha		Telephone No.: 415	-538-3333	Date 04/17/2018					
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3	Program Name: Legal Services Health	Related Law										
5	5 5											
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7							Salaries &	& Benefi	ts Detail			
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10		Agency 1	Totals	For HSA	Program		6 Program		Program		Program	TOTAL
11	TERM	Annual Full TimeSalary for	Total %		Adjusted	4/1/1	8-6/30/18	7/1/1	8-6/30/19		9-6/30/20	4/1/18-6/30/20
12	POSITION TITLE	FTE	FTE	% FTE	FTE	FTE	SALARIES	FTE	SALARIES	FTE	SALARIES	
13												
14	STAFF ATTORNEY	\$63,000	100%	100%	100%	1.000	\$15,750	1.000	\$63,000	1.000	\$63,000	\$141,750
15	PARALEGAL	\$42,000	100%	20%	20%	0,200	\$2,100	0.200	\$8,400	0.200	\$8,400	\$18,900
16	Executive Director	\$89,452	100%	4.2%	4.2%	0.041	\$942	0.041	\$3,766	0.041	\$3,766	\$8,474
17												
18												
19												
20												
21		\$194,452	3.00	1.24	1.24							
22		<u>5194,452</u>	5.00	1.24	1.24	1.041	\$18,792	1.241	\$75,166	1.241	\$75,166	\$169,124
23 24	TOTALS					1.241	\$10,792	1.241	\$75,100	1.241	φ/0,100 <u> </u>	
25								r				
26	EMPLOYEE FRINGE BENEFITS					32.9%	\$6,174	32.9%	\$24,693	32.9%	\$24,693	\$55,560
27 28												
							\$24,966		\$99,859		\$99,859	\$224,684
	TOTAL OOA SALARIES & BENEFITS						φ24,000		000,000		400,000	+LL 1,00 /
30												
31	NON-OOA POSITION TITLE						0.150			0.000		e1 400
	Executive Director	\$89,452	100%	0.9%	0.9%	0.009	\$156	0.009	\$62 <u>3</u>	0.009	\$623	\$1,402
33												
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38	TOTALS					0.009	\$156	0.009	\$623	0.009	\$623	\$1,402
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40	EMPLOYEE FRINGE BENEFITS							·				
41									I		I	
42	TOTAL NON-OOA SALARIES & BENE	FITS					\$156		\$623		\$623	\$1,402
43	TOTAL SALARIES & BENEFITS					1.250	\$25,122	1.250	\$100,482	1.250	\$100,482	\$226,086
44												
45	HSA #2											
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4	Program Name: Legal Services Health Related	d Law				
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6		One	rating Expense De	stail		
7		Obe	rading Expense De	, can		
						TOTAL
9	OOA Expenditure Category	TERM	4/1/18-6/30/18	7/1/18-6/30/19	7/1/19-6/30/20	4/1/18-6/30/20
				\$10,905	\$10,905	\$24,537
	Rental of Property		\$2,727			
12	Utilities(Elec, Water, Gas, Phone, Scavenger)		\$348	\$1,390	\$1,390	\$3,128
13	Office Supplies, Postage		\$332	\$1,330	\$1,330	\$2,992
14	Maintenance Supplies and Repair		\$88	\$350	\$350	\$788
15	Printing and Reproduction		\$53	\$210	\$210	\$473
16	Insurance		\$382	\$1,530	\$1,530	\$3,442
17	Staff Travel (local) &Training		\$107	\$430	\$430	\$967
	Law Library		\$1,500	\$570	\$570	\$2,640
	Membership/Dues					
	Rental of Equipment		\$140	\$560	\$560	\$1,260
	CONSULTANT/SUBCONTRACTOR					
22 23		_ ·			·	
23						
	OTHER	_ ·				
	Volunteer Expenses (Receptionist/intake)		\$65	\$260	\$260	\$585
	State BAR Dues		\$103	\$410	\$410	\$923
28	Jantorial service & supplies		\$185	\$740	\$740	\$1,665
	Outreach Publications		\$2,500			\$2,500
_30						
31	TOTAL OOA OPERATING EXPENSE		\$8,530	\$18,685	\$18,685	\$45,900
32				1. Z 1 **		
33	NON-OOA Operating Expense					
34	Rental of Property					
35	Telephone					
	Office Supplies, Postage					
					<u> </u>	
	Printing and Reproduction					
	Insurance					
39	Law Library	ő	·			
40	Membership/Dues					
41	Rental of Equipment					
42	Volunteer Expenses (Receptionist/intake)					
	Client Costs					
	Maintenance Supplies and Repair					
45						
46						
40						
			0 0	<u>م</u>	ድሶ	\$0
48 49	TOTAL NON-OOA OPERATING EXPENSE		\$0	\$0	\$0	
50	TOTAL OPERATING EXPENSE		\$8,530	\$18,685	\$18,685	\$45,900
51	116A #2					
52 53	HSA #3					

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6					xpenditure De			
7				(Equipment	and Remodeling	Costj		TOTAL
		apital Expend	litures		4/1/18-6/30/18	7/1/18-6/30/19	7/1/19-6/30/20	TOTAL 4/1/18-6/30/20
9	EQUI	PMENT		TERM	4/1/18-0/30/16	771718-0730/19	11119-0/30/20	4/1)10-0/30/20
10	No.		ITEM/DESCRIP	TION				-
11		2 Computers,			\$3,000	_		\$3,000
			s: 2 desks, cubical,	file cabinet,	\$2,000			\$2,000
12		telephone, ins	stallation		\$2,000			φ2,000
13								
	TOTAL	EQUIPMENT	COST		\$5,000			\$5,000
15								
16	REM	ODELI	NG				r	
17	Descript	tion:						
18								
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	TOTAL	REMODELIN	IG COST					
22					L			
			L EXPENDITURE		\$5,000			\$5,000
		ent and Remo						
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26	NON-O	OA Capital E	xpenditures					TOTAL
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APPENDIX A-2 - SERVICES TO BE PROVIDED BY GRANTEE

LEGAL ASSISTANCE TO THE ELDERLY

DIGNITY FUND

LIFE PLANNING LEGAL SERVICE PROGRAM FOR LGBT OLDER ADULTS AND ADULTS WITH DISABILITIES

April 1, 2018 – June 30, 2020

I. Purpose

The purpose of this grant is to provide Life Planning Legal Services to older adults and adults with disabilities living in the City and County of San Francisco and who self-identify as non-heterosexual and/or whose gender identity does not correspond to their birth sex (LGBT). The legal service program funded by this grant is intended to ensure that LGBT Older Adults and Adults with Disabilities have access to legal services that provide legally-recognized Life Planning Documents that express their individual wishes and decisions in the event that they are unable to do so and/or upon their death.

II. Definitions

Person 18 years of age or older living with a
disability/disabilities
A web-based application that provides specific functionalities
for contracted agencies to use to perform consumer
intake/assessment/enrollment, record service objectives, run
reports, etc.
The State Bar of California is the regulatory agency for the
state's lawyers, charged with admitting and disciplining
attorneys.
Contracts Administration, Reporting and Billing On Line
System
City and County of San Francisco, a municipal corporation.
An Older Adult and/or Adult with Disabilities enrolled in the
Life Planning Legal Services Program
Controller of the City and County of San Francisco or
designated agent.
Department of Aging and Adult Services
The City and County of San Francisco, City Charter,
Sections 16.128-1 through 16.128-12. Monies in the Fund
shall be used to expend by DAAS solely to help seniors and
adults with disabilities secure and utilize the services and
support necessary to age with dignity in their own homes and
communities.
A condition attributable to mental or physical impairment, or
a combination of mental and physical impairments including

Education	 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. Preparation and presentation of information designed to educate the target populations on life planning documents, health care benefits, rights, and advocacy services available
Frail	to them. Time spent in delivery of this service will includepreparation and travel time.An older individual is determined to be functionally impaired
	because the individual either: (a) Is unable to perform at least two activities of daily living, including bathing, toileting, dressing, feeding, transferring and mobility and associated tasks, 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 older individual behaves in a manner that poses a serious health or safety hazard to the individual or to others.
Fund	Dignity Fund
Grantee	Legal Assistance to the Elderly (LAE)
HSA	San Francisco Human Services Agency
Legal Assistance/ Legal Services	Legal advice, and representation provided by an attorney to older adults and/or adult with disabilities with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a non-lawyer where permitted by law. Direct legal assistance may be provided
	face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro se assistance.
Life Planning Legal	Services provided to individuals to aid in the drafting and
Services	execution of life planning documents
LGBT	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.
Life Planning	Documents that state an individual's wishes in the event that
Documents	they are unable to do so and or upon an individual's death. These documents encompass medical decision making, the disposition of assets upon incapacity or death, and

	disposition of a decedent's remains.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self- identify their income status, not to be used as a means test to qualify for the program.
Minority	Defined by race, ethnicity, religion, sexual orientation, and/or gender identity.
OCM	Office of Contract Management, Human Services Agency
00A	Office on the Aging
Older Adult	Person who is 60 years of age or older; used interchangeably with "Senior"
Outreach	Formal and informal approaches used to engage the target population(s). Formal approaches can include, but are not limited to, one to one contact and/or working with a community collaborative group. Informal approaches can include, but are not limited to, designated grantee employee being present and available in community spaces (i.e. community centers).
Senior	Person who is 60 years of age or older; used interchangeably with the "Older Adult"
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159- 16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve. (Chapter 104, Sections 104.1 through 104.9.)

III. Target Population

The target population of this grant is individuals ages 18 to 59 living with a disability and/or individuals 60 years of age or older residing in the City and County of San Francisco who self-identify as non-heterosexual and/or whose gender identity does not correspond to their birth sex (LGBT). Services should also target consumers who have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Limited English proficiency
- Minority
- Frail

IV. Eligibility for Services

- 1. A resident of San Francisco
- 2. Older Adult as defined, a person 60 years of age or older *or* an Adult with Disabilities as defined, a person 18 years of age or older living with a disability/disabilities

V. Location and Time of Services

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

VI. Description of Services

The Grantee will educate eligible consumers about Life Planning Documents with a particular focus on honing in on any documents and/or laws that have a specific impact on the LGBT population. If requested by the consumers, the Grantee will also advise and provide guidance as to the Life Planning Document(s) that best meet their expressed need and will aid consumers in completing and executing legally recognized life planning documents. Legally recognized life planning documents include, but are not limited to, the following:

- Wills and Trusts
- Power of attorney for financial decision-making and/or medical decision-making
- Advance health care directive
- HIPPA release
- Hospital visitation authorization
- Instructions for the disposition of a decedent's remains
- Other areas as determined in need and approved by DAAS
- 1. The Grantee will conduct Outreach as defined in Section II with the intent of reaching the target population described in Section III and who are in need and seeking life planning legal services. Outreach will be accomplished by the Grantee in multiple ways, including the provision of Education as defined in Section II and the promotion of the Life Planning Legal Service Program for LGBT Older Adults and Adults with Disabilities to consumers, community organizations, health clinics, other legal aid providers, and relevant City departments and/or funded programs.
- 2. The Grantee will establish and maintain partnerships and mutually beneficial communication with community organizations, health clinics, City departments, and other relevant legal aid providers and organizations with the intent of reaching the target population and to ensure a streamlined referral process for consumers between programs as appropriate.
- 3. The Grantee will work in conjunction with other service providers, and when necessary, health care providers to carefully assess and triage consumer needs as it relates to life planning legal services.

- 4. The Grantee will keep current with life planning related laws, rules, regulations that have a potential impact on the LGBT older adult and adult with disabilities populations and will provide culturally and linguistically appropriate legal assistance and services.
- 5. The Grantee will maintain the ability to provide legal services pertaining to life planning related laws as describe above, Section VI Description of Services, and to prepare and execute legally-recognized documents. These legal services will be provided by qualified individual(s).
- 6. The Grantee will be provided with a copy of the California Department of Aging's California Statewide Guidance for Legal Assistance. While non-binding, the Guidelines should be considered for guidance and technical assistance in the development and provision of legal services.
- 7. The Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and DAAS to help develop and maintain a comprehensive citywide approach to legal service issues as well as discuss any relevant issues pertaining to the Life Planning Legal Service Program for LGBT Older Adults and Adults with Disabilities Program.
- 8. The Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) as applicable.
- 9. The Grantee will create and administer a consumer satisfaction survey with Likert-type scales that includes a comment section for consumers' additional feedback to all consumers who receive legal services under this grant agreement. The survey must capture the necessary data to report on the outcome objectives defined in Section VIII Outcome Objectives. DAAS shall be provided with a copy of the consumer satisfaction survey each fiscal year.

VII. Service Objectives

On an annual basis, the Grantee will meet the following Service Objectives:

For FY <u>17/18</u>:

- 1. Grantee will enroll and provide legal assistance to $\underline{10}$ unduplicated consumers
- 2. Grantee will provide a minimum of <u>157</u> units* of Life Planning Legal Services
- 3. Provide a minimum of <u>12</u> units* of staffing to conduct Outreach and Education

For FY18/19:

- 1. Grantee will enroll and provide legal assistance to 100 unduplicated consumers
- 2. Grantee will provide a minimum of <u>922</u> units* of Life Planning Legal Services
- 3. Provide a minimum of <u>48</u> units* of staffing to conduct Outreach and Education

Life Planning Legal Services 4/1/18-6/30/20

For FY 19/20:

- 1. Grantee will enroll and provide legal assistance to <u>100</u> unduplicated consumers
- 2. Grantee will provide a minimum of <u>922</u> units* of Life Planning Legal Services
- 3. Provide a minimum of <u>48</u> units* of staffing to conduct Outreach and Education

*A unit is one hour

VIII. Outcome Objectives

- 1. At least 80% of the registered number of unduplicated consumers who complete a survey will report a positive experience.
- 2. At least 75% of the registered number of unduplicated consumers who complete a survey will report an increased understanding of life planning services available to them.
- 3. At least 75% of unduplicated consumers who complete a survey will report that the life planning legal services they received enabled them to feel more confident that their wishes and decisions will be honored in the event they are incapacitated and/or upon their death.

IX. Reporting Requirements

- 1. The Grantee will track and record the units of service received by enrolled consumers in CA.GetCare by the 5th working day of the month for the preceding month.
- 2. The Grantee will enter monthly reports into the CARBON database system which includes number of enrolled consumers and hours of services provided by the 15th of the following month.
- 3. The 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.
- 4. The 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 in the CARBON system.
- 5. The 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.
- 6. The Grantee shall develop and deliver an annual summary report of SOGI data collected in each grant year as requested by DAAS/HSA. The due date for submitting the annual summary report is no later than July 10th each grant year.

- 7. The Grantee will provide an annual consumer satisfaction survey report to DAAS by March 15 each grant year or a mutually agreed upon date between DAAS and the Grantee.
- 8. The Grantee shall develop and deliver ad hoc reports as requested by HSA and/or DAAS.

For assistance with reporting requirements or submission of reports, contact:

Rocio Duenas <u>Rocio.Duenas@sfgov.org</u> Contract Manager Office of Contract Management

Or

Tiffany Kearney <u>tiffany.kearney@sfgov.org</u> Dignity Fund Program Analyst Department of Aging and Adult Services

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; consumer eligibility and any targeted mandates, back up documentation for the units of service and all reporting including the log of service units which is based on the service provision hours; sign-in sheets of consumers who participated in services, and progress of service and outcome objectives; how consumer 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 Security Awareness Training; program operation, which includes a review of a written policies and procedures manual of all DAAS 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; a board of director list and whether services are provided appropriately according to Sections IV, VI, and VII.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	В	С	D	E					
1				Appendix B-2, Page 1						
2	Document Date: 4/12/18									
	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY									
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY BY PROGRAM									
<u> </u>										
5	Name:			Term:						
6	Legal Assistance to The Elderly 4/1/18-6/30/20									
7	(Check One) X New Renewal	Modification								
8	If modification, Effective Date of Mod.	No. of Mod.								
<u> </u>										
9	Program: LGBT Life Planning Legal Services									
10	Budget Reference Page No.(s)				TOTAL					
	Program Term	4/1/18-6/30/18	7/1/18-6/30/19	7/1/19-6/30/20	4/1/18-6/30/20					
12	OOA Expenditures									
	Salaries & Benefits	\$7,386	\$29,542	\$29,542	\$66,470					
1	Operating Expense	\$6,974	\$9,838	\$9,838	\$26,650					
	Subtotal	\$14,360	\$39,380	\$39,380	\$93,120					
	Indirect Percentage (%)	14.27%	14.27%	14.27%	14.27%					
17	Indirect Cost (Line 16 X Line 17)	\$2,049	\$5,620	\$5,620	\$13,289					
	Subcontractor Expense	\$7,500	\$30,000	\$30,000	\$67,500					
	Capital Expenditure	\$3,600			\$3,600					
20	Total OOA Expenditures	\$27,509	\$75,000	\$75,000	\$177,509					
21	Non OOA Expenditures									
22	Salaries & Benefits									
	Operating Expense									
24	Capital Expenditure									
25	Total Non-OOA Expenditures									
26										
27	Total OOA and Non-OOA Expenditures	\$27,509	\$75,000	\$75,000	\$177,509					
28	OOA Revenues									
29	Local General Fund	\$27,509	\$75,000	\$75,000	\$177,509					
30										
31										
32										
33										
34										
35					<u>_</u>					
36		*** F**		¢75.000	¢177 E00					
37	TOTAL OOA REVENUES	\$27,509	\$75,000	\$75,000	\$177,509					
38	Other Revenues									
39	Project Income									
40	In-Kind									
41	Fund-Raising Other Grants (MOCD, IOLTA, EQAC)				·····					
42										
	Tatal Devenues	\$27,509	\$75,000	\$75,000	\$177,509					
44	Total Revenues				+ · · · · · · · · · · · · · · · · · · ·					
45	Full Time Equivalent (FTE)	0.35	0.35	0.35						
47	Prepared by: Eric Ha Telephone No.: 415-538-3333 Date 04/17/2018									
48	HSA-CO Review Signature:									
49	9 HSA #1									
00	L									

											K	
	Α	В	С	D	E	F	G	H	ł		K Appendix B-2, F	Page 2
1	Document Date: 4/12/18											
3												
4	Program Name: LGBT Life Planning Le	egal Service:	S									
6												
7							Salaries & E	Benefits	Detail			
8												
9												
10		Agency	y Totals	For HSA	Program	DA	AS Program	DAA	S Program	DAAS	S Program	TOTAL
10	TERM	Annual Full		101110/1			/18-6/30/18		18-6/30/19		9-6/30/20	4/1/18-6/30/20
	POSITION TITLE	TimeSalary for FTE	Total % FTE	% FTE	Adjusted FTE	FTE	SALARIES	FTE	SALARIES	FTE	SALARIES	
12		\$89,452			4.9%	0.050	\$1,097	0.050	\$4,389	0.050	\$4,389	\$9,875
					15.0%	0.150	\$2,550	0.150	\$10,201	0.150	\$10,201	\$22,952
	STAFF ATTORNEY	\$68,000		18.8%				0.150	\$7,639	0.150	\$7,639	\$17,188
	STAFF ATTORNEY	\$51,000	40%	37.5%	15.0%	0.150	\$1,910	0.150	\$7,005	0.100	ψ1,005	
16												
17												
18												
19								-				
20												
21												
22		\$208,452	2.20	0.61	0.35					0.050	600.000	\$50.01E
23 24	TOTALS					0.350	\$5,557	0.350	\$22,229	0.350	\$22,229	\$50,015
25												
26	EMPLOYEE FRINGE BENEFITS					32,9%	\$1,829	32.9%	\$7,313	32.9%	\$7,313	\$16,455
27												
28							\$7,386		\$29,542		\$29,542	\$66,470
	TOTAL OOA SALARIES & BENEFITS				l		\$7,550		\$20,01L			
30									-			
31	NON-OOA POSITION TITLE	1	-									
32										-		
33												
34	· · · · · · · · · · · · · · · · · · ·									· · · · ·		
35				<u> </u>								
36												
37						0.000	0	0.000	\$0	0.000	\$0	\$0
38	TOTALS					0.000	0	0.000		0.000	ψυ	
39												\$0
	EMPLOYEE FRINGE BENEFITS]			<i>40</i>
41	TOTAL NON-OOA SALARIES & BENE	FITS					0		\$0		\$0	\$0
	TOTAL SALARIES & BENEFITS					0.350	7,386	0.350	\$29,542	0.350	\$29,542	\$66,470
	IVIAL OALANIES & BENEFIIS					0.000						
44	HSA #2											
46												

A B C D	E F	G H	I J	L
1				pendix B-2, Page 3 ocument Date: 4/12/18
2 3				
4 Program Name: LGBT Life Planning Legal Service	es			
5 6				
7 Oper	ating Expense Detai	I		
8				
9				TOTAL
10 OOA Expenditure Category TERM	4/1/18-6/30/18	7/1/18-6/30/19	7/1/19-6/30/20	4/1/18-6/30/20
11 Rental of Property	\$1,167	\$4,666	\$4,666	\$10,499
12 Telephone	\$120	\$466	\$466	\$1,052
13 Office Supplies, Postage	\$140	\$565	\$565	\$1,270
14 Maintenance Supplies and Repair	\$150	\$150	\$150	\$450
15 Printing and Reproduction	\$240	\$956	\$956	\$2,152
16 Insurance	\$165	\$660	\$660	\$1,485
17 Staff Travel (local) &Training	\$1,000	\$180	\$180	\$1,360
18 Law Library	\$1,000	\$245	\$245	\$1,490
19 Membership/Dues	\$37	\$150	\$150	\$337
20 Rental of Equipment	\$60	\$240	\$240	\$540
21 CONSULTANT/SUBCONTRACTOR			<u> </u>	
22 Subcontract - ALRP	\$7,500	\$30,000	\$30,000	\$67,500
23 Consumer Outreach	\$250	\$1,000	\$1,000	\$2,250
24				
25 OTHER	400	¢440	¢110	\$250
26 Volunteer Expenses (Receptionist/intake) 27 State BAR Dues	\$30	\$110	\$110	φ230
28 Outreach Publications	\$2,500			\$2,500
29 Utilities	\$35	\$130	\$130	\$295
30 Jantorial service & supplies	\$80	\$320	\$320	\$720
	¢14 474	\$39,838	\$39,838	\$94,150
32 TOTAL OOA OPERATING EXPENSE	\$14,474	409,000		
33		<u> </u>	······	
34 NON-OOA Operating Expense				
35 Rental of Property			<u> </u>	
36 Telephone				
37 Office Supplies, Postage				
38 Printing and Reproduction				
39 Insurance				
40 Law Library				
41 Membership/Dues				
42 Rental of Equipment				
43 Volunteer Expenses (Receptionist/intake)				
44 Client Costs				
45 Maintenance Supplies and Repair				
46				
47				
49 TOTAL NON-OOA OPERATING EXPENSE	\$0	\$0	\$0	\$0
50 51 TOTAL OPERATING EXPENSE	\$14,474	\$39,838	\$39,838	\$94,150
52				
53 HSA #3				

	A	В	С	D	E	F
1			·		Appendix B-2, P	age 4
2	5	U ODT Life Dianning Logal Convisas			Document Date:	4/12/18
3	Program	n: LGBT Life Planning Legal Services				
5						
6		Capital Ex	penditure Det	ail		
7		(Equipment a	nd Remodeling C	Cost)		
		apital Expenditures		7440 00040	7/1/10 0/20/20	TOTAL 4/1/18-6/30/20
9	<u>EQU1</u>	PMENT TERM	4/1/18-6/30/18	7/1/18-6/30/19	7/1/19-6/30/20	4/1/10-0/30/20
10	No.	ITEM/DESCRIPTION				
11		2 computers & printer	\$3,000			\$3,000
12		Desk + Chair+ file cabinet	\$600			\$600
13						
_	ΤΟΤΑΙ	EQUIPMENT COST	\$3,600			\$3,600
15						
		O D E L I N G				
	Descrip	lion.				
18						
19						
20						
21	TOTAL	REMODELING COST			<u> </u>	<u> </u>
22	-					\$3,600
		OOA CAPITAL EXPENDITURE	\$3,600			\$3,600
24 25	4 · · · ·	nent and Remodeling Cost)				
	1	OA Conital Expanditures				TOTAL
26 27	-	OA Capital Expenditures PMENT TERM				
28	No.	ITEM/DESCRIPTION				
29	1					
30					<u> </u>	
31						
32	TOTAL	EQUIPMENT COST				
33						
34	REN	IODELING				
35	Descrip	ption:				
36	1					
37						
38						
39	7	REMODELING COST				
-	-					
40	-	NON-OOA CAPITAL EXPENDITURE				
41	_	_ NON-OOA CAPITAL EXPENDITORE ment and Remodeling Cost)				
43	-					
44						
45	HSA #	4				4/12/200