City and County of San Francisco

Department of Human Services

Department of Aging and Adult Services

Human Services Agency

Trent Rhorer, Executive Director Shireen McSpadden, Executive Director

MEMORANDUM

TO:	AGING and	ADULT SEI	RVI	CES COMMI	SSION	
THROUGH:	SHIREEN N	MCSPADDEN	N, E	XECUTIVE	DIRECTOR	
FROM:	CINDY KA JOHN TSƯ	UFFMAN, D FAKAWA, D	EPU DIRE	JTY DIRECT	OR ONTRACTS	a 1
DATE:	FEBRUAR	Y 15, 2017				
SUBJECT:					GENCIES (NON- LTH INITIATIVE	· · · · · · · · · · · · · · · · · · ·
MODIFICATION TERM:	1/1/17-6/30/	17				
GRANT AMOUNT:	<u>New</u> \$200,000	<u>Contingenc</u> \$20,000	Y	<u>Total</u> \$220,000		
ANNUAL AMOUNT:	<u>FY16/17</u> \$200,000					
Funding Source FUNDING: PERCENTAGE:	<u>County</u> \$200,000 100%	<u>State</u>	<u>Fe</u>	ederal	Contingency \$20,000	<u>Total</u> \$220,000 100%

The Department of Aging and Adult Services (DAAS) requests authorization to modify existing grants with the grantees listed in the table below for the period of January 1, 2017 to June 30, 2017 in the additional amount of \$200,000 plus a 10% contingency for a total amount not to exceed \$220,000. The purpose of the grant modification is to provide one-time only (OTO) funding to Grantees for provision of senior fitness programs through their existing DAAS grant agreements.

Grantee	Grant Name	Modification FY 16-17	Revised Total Amount	Revised Total Not-to- Exceed Grant Amount (includes 10% contingency)
Bayview Hunters Point Multipurpose Senior Services	Community Services	\$110,000	\$1,810,070	\$1,991,077
Southwest Community Corporation	Community Services	\$50,000	\$717,146	\$788,861
On Lok Day Services	Health Promotion Program (Physical Fitness & Fall Prevention)	\$40,000	\$818,872	\$900,759
Total OTO Add-back Grants		\$200,000		

Background

Through the FY2016-17 add-back budget process, San Francisco Board of Supervisors (BOS) allocated \$200,000 for provision of Senior Fitness/Health Initiatives. These initiatives are designed to promote physical fitness and



wellness among older adults with the goal of increasing their ability to live independently in a community setting. Bayview Hunters Point Multipurpose Senior Services, Southwest Community Corporation and On Lok Day Services will provide the services through their existing DAAS grants, which provide much needed services to seniors and adults with disabilities to improve and maintain their overall health and well-being.

Services to be Provided

Augmentation of funding will allow Grantees to expand their current programming related to activities designed to improve participants' mental, physical and emotional health and/or pilot new senior fitness initiatives. These initiatives will address the needs of participants holistically by combining physical health activities and opportunities for social engagement.

Grantees will use the funds in following ways:

<u>Bayview Hunters Point Multipurpose Senior Services:</u> Grantee will purchase fitness supplies and equipment, and hire instructors to promote overall health and wellness of the participants through its Rafiki wellness program. Grantee will also hire a Health Navigator who will organize community health and wellness classes with partners such as University of California, San Francisco, Arthritis Foundation and Kaiser Permanente, and an Outreach Specialist for promoting and marketing the expanded offerings at the Dr. George W. Davis Senior Center.

<u>Southwest Community Corporation</u>: Grantee will purchase fitness supplies and equipment and hire instructors to expand their offering of exercise classes and activities. Grantee will also develop new programming such as walking groups and tours, holistic wellness approaches, and other offerings focusing on fitness and health. Most onsite activities will take place at I.T. Bookman Community Center.

<u>On Lok Day Services - Health Promotion (Physical Fitness & Fall Prevention)</u>: Grantee will purchase fitness supplies and equipment and hire a part-time program assistant to support the expansion of the evidence-based Always Active physical fitness program at Dr. George W. Davis Senior Center and I.T. Bookman Community Center. This program provides health promotion classes and personal consultation for consumers enrolled in the classes. Consultations by trained staff members are available to the consumers and include exercise recommendations and a wellness program for the participant. Additionally, the staff or volunteer at Dr. George W. Davis Senior Center and I.T. Bookman Community Center will be trained and certified to lead the Always Active classes in order to continue these classes after the OTO funding ends.

Selection

Bayview Hunters Point Multipurpose Senior Services and Southwest Community Corporation were selected through the Notice of Financial Assistance (NOFA) #531 issued in December 2012. On Lok Day Services was selected through Request for Proposal (RFP) #683 issued in April 2016.

Funding

Funding for these grants is provided entirely by the City and County General Fund as a result of the add-back budget process for FY2016-17.

ATTACHMENTS

Bayview Hunters Point Multipurpose Senior Services Appendix A-3 – Services to be Provided Appendix B-4 – Program Budget

Southwest Community Corporation Appendix A-2 – Services to be Provided Appendix B-5 – Program Budget

On Lok Day Services Appendix A-2b – Services to be Provided Appendix B-2b – Program Budget

APPENDIX A-3 – SERVICES TO BE PROVIDED

Bayview Hunter's Point Multipurpose Senior Services, Inc. Community Services @ Dr. George W. Davis Senior Center

Effective July 1, 2013 to June 30, 2018

I. **Purpose** The purpose of this grant is to maintain or improve the well being of seniors through the provision of

a variety of services and activities in activity centers/senior centers.

City City and County of San Francisco, a municipal corporation. Controller Controller of the City and County of San Francisco or designated agent. Grantee Bayview Hunter's Point Multipurpose Senior Services, Inc., Dr. George W. Davis Senior Center HSA Human Services Agency of the City and County of San Francisco OCM Office of Contract Management, Human Services Agency Purchaser Director of Purchasing of the City and County of San Francisco, or designated agent. DAAS Department of Aging and Adult Services OOA Office on the Aging Senior Person who is 60 years or older Adult with Person 18 years of age or older living with a disability Disability 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: self-care, receptive and expressive language, learning, mobility, self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment.

II.

Definitions

Frail	An older individual that 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, breathing, 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 others.
Activity Scheduling	This is one of four service categories within Community Services. Service units are captured by the number of scheduled activity hours sponsored by the Activity/Senior Centers. Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes that help consumers maintain/enhance their level of functioning.
Translation	This is one of four service categories within Community Services. Service units are captured by the number of hours of translation assistance provided to consumers that cannot speak/read English. In addition, Translation may also include the use of American Sign Language, Braille, or Teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation for group announcements, presentations, etc.
Social Services/Other	This is one of the four service categories within Community Services. Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
Enhanced Outreach	This is one of four service categories within Community Services. Service units are captured by providing more formal outreach efforts and enhanced
	services to support the outreach efforts. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc.
Unit of Service	Defined as one hour of service
Low Income	Having income at or below 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.
CARBON	Contracts Administration, Reporting and Billing On Line System

Minority
An ethnic person of color who is any of the following:
a) Black – a person having origins in any of the Black racial groups of Africa,
b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race,
c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.

III. Target Population

This grant will serve seniors (age 60 and over) and/or adults age 18-59 with disabilities who reside in the City and County of San Francisco with one or more of the following target priorities:

- 1. Low-income
- 2. Non or limited English speaking
- 3. Minority
- 4. Frail
- 5. Lesbian/Gay/Bisexual/Transgender

IV. Eligibility for Community Services

- Persons aged 60 and above
- Persons 18 years of age or older living with a disability

V. Location and Time of Services

The George W. Davis Senior Center is located at 1753 Carroll Ave., San Francisco, CA 94124. The Center is open Monday through Friday, 9:00 a.m. to 5:00 p.m.

VI. Service Description

Community Services consist of activities/services that focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older persons and adults with disabilities. Such services are provided in the agency's community center and in the community.

There are three main categories of services: Activity Scheduling, Translation and Social Services/Other. However, a new category is being introduced for those activity/senior centers proposing to do Enhanced Outreach. While there is an expectation that activity/senior centers will do a reasonable amount of outreach within their existing Community Service budgets, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Services should be provided according to OOA Community Services Standards.

VII. Contractor Responsibilities

- Provide quality services that attain a high satisfaction level from participants.
- Provide services that meet the needs of individual

- Provide physical activities that may increase the health of participants.
- Increase access to informational and educational presentations that enable individuals to maintain independent living.
- Provide activities to increase socialization opportunities for individuals.

VII. Service Objectives

On an annual basis:

- Grantee will serve <u>600</u> unduplicated seniors and younger adults with disabilities.
- Grantee will provide <u>1,500</u> units of service of scheduled activities at a center or venues approved by the Office on the Aging.
- Grantee will provide <u>650</u> units of service of social services.
- Grantee will provide <u>500</u> Units of Enhanced Outreach (1 Unit = 1 staffing hour) to extend the reach of Community Services to isolated seniors and adults with disabilities.

Pursuant to 2016 Senior Fitness addback, the following additional Service Objective is added for FY 16/17 and FY 17/18. Services are to be provided at Bayview Hunter's Point Dr. George Davis location, as listed on Appendix F.

FY 16/17:

• Grantee will provide <u>1600</u> units of service of scheduled activities approved by the Office on the Aging.

FY 17/18:

• Grantee will provide <u>1700</u> units of service of scheduled activities at a center or venues approved by the Office on the Aging.

VIII. Outcome Objectives

- At least 85% of participants surveyed will indicate excellent or good in rating the quality of services they receive.
- At least 85% of participants surveyed will indicate that they receive the services and/or activities they need from the agency.
- At least 80% of participants surveyed who participate in one or more physical activities will report feeling more healthy due to participation.
- At least 80% of participants surveyed who participate in one or more informational/educational presentations will report they receive information to help them maintain independent living.
- At least 85% or more of participants surveyed will report that center activities increase their socialization opportunities and interaction with others.

• There will be at least a 5% increase in the number of unduplicated consumers participating in the designated activity/senior center as a result of Enhanced Outreach each year.

IX. Reporting and Other Requirements

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

- A. The grantee will enter into the CA GetCare consumers' data in the Community Services module.
- B. 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.
- C. Monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system regarding the following:
 - 1. Number of unduplicated consumers served during the month.
 - 2. Number of units of service of scheduled activities at an activity/senior center or venues approved by the Office on the Aging provided during the month.
 - 3. Number of units of translation services provided during the month.
 - 4. Number of units of social services provided during the month.
 - 5. Number of enhanced outreach units of services provided during the month.
- D. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VII & VIII Service & 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.
 - The percentage of participants surveyed that have indicated they have received the services and/or activities they needed from the agency.
 - The percentage of participants surveyed that have participated in one or more physical activities, have reported feeling healthier due to participation.
 - The percentage of participants surveyed who have participated in one or more informational/educational presentations have reported they have received information to help them maintain independent living.
 - The percentage of participants surveyed reported that center activities have increased their socialization opportunities and interaction with others.
 - Percentage increase in the number of unduplicated consumers participating in the designated activity/senior center as a result of Enhanced Outreach each year
- E. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month and shall be entered on line to this website link: https://sfhsa.hfa3.org/signin
- F. 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.

- G. Grantee will provide an annual consumer satisfaction survey report to OOA by March 15 each grant year.
- H. Grantee shall develop and deliver ad hoc reports as requested by HSA.
- I. 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:

Linda Murley (Worker #6206) Program Analyst P.O. Box 7988 San Francisco, CA 94120 <u>linda.murley@sfgov.org</u>

Elena Baranoff (Worker #GB24) Senior Contract Manager Human Services Agency PO Box 7988 San Francisco, CA 94120 elena.baranoff@sfgov.org

- XI. 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 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.

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4	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY BY PROGRAM	ENCY CONTRACT	BUDGET SUMMAR BY PROGRAM	ARY AM			
5	Contractor's Name				Contract Term	E	
9	Bayview Hunters Point Multipurpose So	ultipurpose Senior Services, Inc.			7/1/13-6/30/18		
	(Check One)	Modification X					
	If modification, Effective Date of Mod. 1/1/17	1/17 No. of Mod.	4				
6	Program: Community Services - Dr. Davis	avis					
10	10 Budget Reference Page No.(s)						Total
+++++++++++++++++++++++++++++++++++++++	Program Term	7/1/13-6/30/14	7/1/14-6/30/15	7/1/15-6/30/16	7/1/16-6/30/17	7/1/17-6/30/18	7/1/13-6/30/18
10	Salaries & Bene	\$199.426	\$199.426	\$237.412	\$264.491	\$243,161	\$1 143 917
4	Operating Expense	\$75,218	\$79,049	\$73,233	\$176,386	\$97,716	\$501,602
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9		10%	10%	10%		10%	
17	Indirect Cost (Line 16 X Line 15)	\$27,464	\$27,848	\$31,064	\$44,088	\$34,088	164,552
<u> </u>	19 Total Expenditures	\$302.109	\$306.323	\$341.708	\$484 965	\$374.965	\$1 810 070
20	HSA Revenues					1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	2 2 2 2 2 2 2 2 2 2
_	General Fund	\$302,109	\$306,323	\$341,708	\$484,965	\$374,965	\$1,810,070
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3 3 29	TOTAL HSA REVENUES Other Revenues	\$302,109	\$306,323	\$341,708	\$484,965	\$374,965	\$1,810,070
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	Total Revenues	\$302.109	\$306.323	\$341 708	\$484 965	\$374 965	\$1 810 070
37							
39	Prepared by: Justin Cheung			Telephone No.: 415-826-4774	15-826-4774		Date:1/18/17
40	40 HSA-CO Review Signature:						
4	41 HSA #1		-				

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7		Agency Totals	otals	For HS/	For HSA Program		For DHS Program	For DHS Program For DHS Program For DHS Program For DHS Program	For DHS Program	Ι.	TOTAL
5	POSITION TITLE	Annual Full TimeSalary for FTE	Total % FTE	% FTE	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	7/1/13-6/30/18
13	Executive Director	\$95,000	100%	25%	25%	\$20,800	\$20,800	\$23,750	\$23,750	\$23,750	\$112,850
4	Program Director	\$48,880	88%	100%	88%	\$35,361	\$35,361	\$42,770	\$42,770	\$42,770	\$199,032
15	Activity Coordinator	\$32,136	81%	100%	81%	\$21,376	\$21,376	\$26,111	\$26,111	\$26,111	\$121,084
16	Social Service/Outreach	\$36,420	100%	50%	50%	\$14,997	\$14,997	\$18,210	\$18,210	\$18,210	\$84,624
17	Janitor	\$26,000	45%	100%	45%	\$11,783	\$11,783	\$13,000	\$14,560	\$15,600	\$66,726
18	Operations Director	\$61,297	100%	50%	50%	\$26,000	\$26,000	\$30,649	\$30,649	\$30,649	\$143,946
19	Executive Assistant	\$49,920	100%	50%	50%	\$16,744	\$16,744	\$22,960	\$24,960	\$24,960	\$106,368
20	Front Dest Manager	\$28,080	75%	29%	44%	\$12,480	\$12,480	\$12,480	\$12,480	\$12,480	\$62,400
21	Outreach-Health Promotion	\$18,104	100%	100%	100%	\$0	\$0	\$0	\$18,104	\$0	\$18,104
5											
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29	TOTALS	\$395,837	7.89	6.34	5.34	\$159,541	\$159,541	\$189,930	\$211,593	\$194,529	\$915,134
31 3	FRINGE BENEFIT RATE	25%	-								
32		A28'A28				\$39,885	\$39,885	\$47,482	\$52,898	\$48,632	\$228,783
33 34 35	TOTAL SALARIES & BENEFITS	\$494,796				\$199,426	\$199,426	\$237,412	\$264,491	\$243,161	\$1.143.917
36	HSA #2)					•		1/18/2017

1 2 3 3 4 Program: Community Services 5 (Same as Line 9 on HSA #1) 6 0 7 0 9 0 10 1 11 12 12 Expenditure Category 13 Travel 14 Utilities(Elec, Water, Gas, Phone, Scavenger) 15 Office Supplies, Postage 16 Building Maintenance Supplies and Repair 17 Program Supplies		1 07 07		7/1/16-6/30/17 \$2,000 \$25,589 \$4,175 \$6,400 \$27,492 \$6,000		96 3 11/1 1 8 8 8 1/1/1 1 8 8 8 1/1/1 1 1/1/1 1 1/1 1 1	3 8/17 TOTAL 7/1/13-6/30/18 \$ 9,000 \$ 116,480 \$ 116,480 \$ 32,000 \$ 32,000 \$ 32,000 \$ 20,350 \$ 32,000 \$ 26,800 \$ 5 26,800
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18 Insurance			000		\$6,000	G	26,800
19 Printing & Reproduction \$	\$0,20U	\$6,200	000.24	\$6,200	\$6,200	~	
20 Elevator Maintenance \$	\$3,300	\$3,300	\$3,300	\$3,600	\$3,600	ы	17,100
21 Rental of Equipment \$	\$7,560	\$7,560	\$7,560	\$7,560	\$7,560	ф	37,800
RACTOR DESCRIPTIVE TITLE			000 014	6 000 000 000 000 000 000 000		6	
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26							
27							
28 OTHER							
29 30 Rafiki wellness classes				240 000		G	40,000
31 Health Navigator				\$6,250		- -	6.250
32 Marketing/Promotion materials				\$24,870		69	24,870
33 Health Instructors				\$6,250		ф	6,250
TOTAL OPERATING EXPENSE	\$75,218	\$79,049	\$73,233	\$176,386	\$97,716	ь	501,602
36							
37 HSA #3							1/18/2017

APPENDIX A-2 – SERVICES TO BE PROVIDED BY GRANTEE Effective July 1, 2013 to June 30, 2018

Southwest Community Corporation - Community Services

Updated on January 12, 2017 to incorporate the Senior Fitness Add-Back

I. Purpose

The purpose of this grant is to maintain or improve the wellbeing of older adults through the provision of a variety of services and activities at programming centers/senior centers.

II.	Definitions - City	City and County of San Francisco, a municipal corporation
	Controller	Controller of the City and County of San Francisco or designated agent
	Grantee	Southwest Community Corporation
	HSA	Human Services Agency of the City and County of San Francisco
	OCM	Office of Contract Management, Human Services Agency
	DAAS	Department of Aging and Adult Services
	OOA	Office on the Aging
	Adult with Disability	Person 18 years of age or older living with a disability
	Older Adults	Person who is 60 years or older
	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: self-care, receptive and expressive language, learning, mobility, self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment
	Frail	An older individual that 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, breathing, 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 others.
	Low Income	Having income at or below 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.
	Unit of Service	Defined as one hour of service
	CARBON	Contracts Administration, Reporting and Billing On Line System

Minority An ethnic person of color who is any of the following: a) Black - a person havingorigins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native - an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130. Activity This is one of four service categories within Community Services. Service units Scheduling are captured by the number of scheduled activity hours sponsored by the Activity/Senior Centers. Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes that help consumers maintain/enhance their level of functioning. Translation This is one of four service categories within Community Services. Service units are captured by the number of hours of translation assistance provided to consumers that cannot speak/read English. In addition, Translation may also include the use of American Sign Language, Braille, or Teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc. Social This is one of the four service categories within Community Services. Service Services/Other units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person. Enhanced This is one of four service categories within Community Services. Service units Outreach are captured by providing more formal outreach efforts and enhanced services to support the outreach efforts. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc.

III. Target Population

This grant will serve adults aged 60 and over and adults age 18-59 with disabilities who reside in the City and County of San Francisco with one or more of the following target priorities:

- 1. Low-income
- 2. Non or limited English speaking
- 3. Minority
- 4. Frail
- 5. Lesbian/Gay/Bisexual/Transgender

IV. Eligibility for Community Services

• Adults aged 60 and above

• Adults 18 years of age or older living with a disability

V. Location and Time of Services

The Southwest Community Corporation Community Services program is located at the IT Bookman Center, 446 Randolph St., San Francisco, CA 94132. The Center is open Monday through Friday from 9:00 a.m. to 5:00 p.m.

VI. Description of Services

Community Services consist of activities/services that focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older persons and adults with disabilities. Such services are provided in the agency's community center and in the community.

There are four main categories of services: Activity Scheduling, Translation, Social Services/Other, and Enhanced Outreach. Services should be provided according to OOA Community Services Standards.

VII. Contractor Responsibilities

- Provide quality services that attain a high satisfaction level from participants.
- Provide services that meet the needs of individual
- Provide physical activities that may increase the health of participants.
- Increase access to informational and educational presentations that enable individuals to maintain independent living.
- Provide activities to increase socialization opportunities for individuals.

VIII. Service Objectives

On an annual basis:

- Grantee will serve <u>125</u> unduplicated consumers older adults and younger adults with disabilities.
- Grantee will provide <u>1200</u> units of service* of scheduled activities at a center or venues approved by the Office on the Aging.
- Grantee will provide <u>50</u> units of service* of translation services.
- Grantee will provide <u>400</u> units of service* of social services.
- Grantee will provide <u>75</u> units of service* to provide Enhanced Outreach to the Ocean View, Merced Heights, and Ingleside Community with goal of increasing the number of unduplicated consumers by 5% in FY 2016-17 and 2017-18.

Pursuant to FY 2016-17 Senior Fitness add-back, the following additional Service Objective is added for FY 2016-17 and FY 2017-18. Services are to be provided at Southwest Community Corporation's IT Bookman location.

FY 2016-17

• Grantee will provide <u>1250</u> units of service* of scheduled activities approved by the Office on the Aging.

FY 2017-18

• Grantee will provide <u>1300</u> units of service* of scheduled activities at a center or venues approved by the Office on the Aging.

*Unit of service is defined as one hour

IX. Outcome Objectives

- At least 35% of unduplicated clients served in the course of the contract year will complete and return a consumer satisfaction survey.
- At least 85% of participants surveyed will indicate excellent or good in rating the quality of services they receive.
- At least 85% of participants surveyed will indicate that they receive the services and/or activities they need from the agency.
- At least 80% of participants surveyed who participate in one or more physical activities will report feeling more healthy due to participation.
- At least 80% of participants surveyed who participate in one or more informational/educational presentations will report they receive information to help them maintain independent living.
- At least 85% of participants surveyed report that center activities increase their socialization opportunities and interaction with others.

X. Reporting and Other Requirements

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

- A. The grantee will enter into the CA Getcare -consumers' data in the Community Services module.
- B. 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.
- C. Monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system regarding the following:
 - 1. Number of unduplicated consumers served during the month.
 - 2. Number of units of service of scheduled activities at an activity/senior center or venues approved by the Office on the Aging provided during the month.
 - 3. Number of units of translation services provided during the month.
 - 4. Number of units of social services provided during the month.
- D. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VIII & IX 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.
 - The percentage of participants surveyed that have indicated they have received the services and/or activities they needed from the agency.
 - The percentage of participants surveyed that have participated in one or more physical activities, have reported feeling healthier due to participation.
 - The percentage of participants surveyed who have participated in one or more informational/educational presentations have reported they have received information to help them maintain independent living.
 - The percentage of participants surveyed reported that center activities have increased their socialization opportunities and interaction with others.

- E. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month and shall be entered on line to this website link: <u>https://sfhsa.hfa3.org/signin</u>
- F. 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.
- G. Grantee will provide an annual consumer satisfaction survey report to OOA by March 15 each grant year.
- H. Grantee shall develop and deliver ad hoc reports as requested by HSA.
- I. 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:

Linda Murley, Program Analyst (6206)Arata Goto, Contract Manager (GB15)DAAS, Office on the AgingHuman Services AgencyP.O. Box 7988PO Box 7988San Francisco, CA 94120San Francisco, CA 94120linda.murley@sfgov.orgarata.goto1@sfgov.org

XI. Monitoring Activities

<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.

<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.

HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY

Appendix B-5 Date:1/19/17

Southwest Community Corporation (Check One) New

Renewal ____ Modification __X___

		0				
Program: Community Services						
Budget Reference Page No.(s)						Total
Program Term	7/1/13-6/30/14	7/1/14-6/30/15	7/1/15-6/30/16	7/1/16-6/30/17	7/1/17-6/30/18	7/1/13-6/30/18
Expenditures						
Salaries & Benefits	\$60,173	\$60,812	\$78,837	\$134,741	\$132,060	\$466.623
Operating Expense	\$21,283	\$21,780	\$27,673	\$92,106	\$52,806	\$215,648
Subtotal	\$81,456	\$82,592	\$106,510	\$226,847	\$184,866	\$682,271
Indirect Percentage (%)	4.00%	4.00%	4.00%	4.00%	4.00%	4.00%
Indirect Cost (Line 16 X Line 17)	\$3,258	\$3,304	\$4,260	\$9,696	\$8.017	\$28.535
Capital Expenditure	\$0	\$0	\$0	\$6,340	\$0	\$6,340
Total Expenditures	\$84,714	\$85,896	\$110,770	\$242,883	\$192.883	\$717.146
HSA Revenues						
General Fund	\$74,548	\$75,588	\$97,478	\$219,737	\$169,737	\$631,088
CFDA 93.778 Medical Assistance Program	\$10,166	\$10,308	\$13,292	\$23,146	\$23,146	\$86,058
					-	
	5					
TOTAL HSA REVENUES	\$84,714	\$85,896	\$110.770	\$242.883	\$192,883	\$717 146
Other Revenues						
Total Revenues	\$84.714	\$85.896	\$110.770	\$242 883	\$192 883	\$717 1 4 6
Full Time Equivalent (FTE)						
Prepared by: Kristin Rosboro						
HSA-CO Review Signature:						
HSA #1						

Appendix B-5 Date: 1/19/17

> Southwest Community Corporation Program: Community Services (Same as Line 9 on HSA #1)

Salaries & Benefits Detail

					7/1/13-6/30/14	7/1/14-6/30/15	7/1/15-6/30/16	7/1/13-6/30/14 7/1/14-6/30/15 7/1/15-6/30/16 7/1/16-6/30/17	7/1/17-6/30/18 7/1/13-6/30/18	7/1/13-6/30/18
	Agency Totals	Totals	For HSA	For HSA Program						TOTAL
	Annual Full				ι.					
POSITION TITLE	TimeSalary for FTE	Total % FTE	% FTE	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salarv	Budgeted Salarv	Budgeted Salarv
Senior Program Manager	\$37,960	75%	100%	75%	\$32,572	\$29,000	\$25,740	\$28,470	\$28,000	\$143.782
Program Assistant	\$34,885	60%	100%	60%			\$16,224	\$20,931	\$18,720	\$55,875
Community Program Director	\$46,222	%06	85%	77%				\$35,360	\$35,360	\$70,720
Executive Director	\$47,475	100%	80%	80%	\$23,693	\$28,333	\$31,833	\$37,980	\$37,980	\$159,819
						-				
TOTALS	\$166,542	3.25	3.65	2.92	\$56,265	\$57,333	\$73,797	\$122,741	\$120,060	\$430,196
FRINGE BENEFIT RATE	9.78%									
EMPLOYEE FRINGE BENEFITS	\$16,282				\$3,908	\$3,479	\$5,040	\$12,000	\$12,000	\$36,427
TOTAL SALARIES & BENEFITS	\$182,824				\$60,173	\$60,812	\$78,837	\$134,741	\$132,060	\$466.623
HSA #2										-

2

Southwest Community Corporation Program: Community Services (Same as Line 9 on HSA #1) Operating Expense Detail

-6/30/17 7/1/17-6/30/18 7/1/13-6/30/18	\$13,800 \$13,500 \$69,462	\$5,200 \$4,000 \$16,100	\$8,000 \$6,500 \$20,669		\$2,100 \$1,500 \$5,020	\$1,500	\$1,500 \$5,500	\$1,500	\$1,500	\$1,500 \$5,500 \$14,000 \$14,000	\$1,500 \$5,500 \$14,000 \$14,000	\$1,500 \$5,500 \$14,000 \$14,000	\$1,500 \$5,500 \$14,000 \$14,000	\$1,500 \$5,500 \$14,000 \$14,000	\$1,500 \$5,500 \$14,000 \$14,000	\$1,500 \$5,500 \$14,000 \$14,000	\$1,500 \$5,500 \$14,000 \$14,000	\$1,500 \$5,500 \$14,000 \$14,000	\$1,500 \$5,500 \$14,000 \$14,000	\$1,500 \$5,500 \$14,000 \$14,000 \$7,806 \$7,806	\$1,500 \$5,500 \$14,000 \$7,806 \$7,806	\$1,500 \$5,500 \$5,500 \$14,000 \$7,806 \$7,806	\$1,500 \$5,500 \$5,500 \$14,000 \$7,806 \$7,806
<u>6</u> //1/16-6/30/17	\$13,800	\$5,200	\$8,000	\$2,100		\$6,356	\$6,356	\$6,356	\$6,356	\$6,356	\$6,356 \$7,000 \$7,000 \$5,000	\$6,356 \$7,000 \$7,000 \$5,000 \$5,000	\$6,356 \$7,000 \$5,000 \$5,000 \$3,500	\$6,356 \$7,000 \$5,000 \$5,000 \$3,500 \$4,500	\$6,356 \$7,000 \$5,000 \$5,000 \$5,000 \$6,000 \$6,000 \$6,000	\$6,356 \$5,000\$5,000 \$5,0000\$5,0000\$5,0000\$5,0000\$5,0000\$5,0000\$5,0000\$5,0000\$5,0000\$5,0000\$5,0000\$5,0000\$5,0000\$5,0000\$5,0000\$5,0000\$5,0000\$5,0000\$5,0000\$5,	\$6,356 \$5,000\$5,000 \$5,0000\$5,	\$6,356 \$7,000 \$5,000 \$5,000 \$8,000 \$6,000 \$6,000 \$6,500 \$6,500	\$6,356 \$7,000 \$5,000 \$5,000 \$4,500 \$4,500 \$8,000 \$8,000 \$8,000 \$8,000 \$1,150 \$1,150	\$6,356 \$7,000 \$5,000 \$5,000 \$4,500 \$8,000 \$8,000 \$8,000 \$6,500 \$6,500 \$6,500 \$6,500 \$6,500	\$6,356 \$7,000 \$5,000 \$5,000 \$5,000 \$8,000 \$3,500\$000 \$3,500 \$3,500 \$3,500 \$3,500 \$3,500 \$3,500 \$3,500 \$3,500 \$3,500 \$3,500 \$3,500 \$3,5000\$\$3,500 \$3,5000\$\$3,500\$\$\$3,500\$\$\$3,500\$\$\$3,500\$\$\$3,500\$\$\$3,500\$\$\$3,500\$\$\$3,500\$\$\$3,500\$\$\$3,500\$\$\$3,500\$\$\$3,500\$\$\$3,500\$\$\$3,500\$\$\$3,500\$\$\$3,500\$\$\$3,500\$\$\$\$3,500\$\$\$\$3,500\$\$\$\$3,500\$\$\$\$3,500\$\$\$\$\$3,500\$\$\$\$\$\$\$\$\$3,500\$\$\$\$\$\$\$\$\$\$	\$6,356 \$7,000 \$5,000 \$4,500 \$8,000 \$8,000 \$6,500 \$6,500 \$6,500 \$6,500	\$6,356 \$7,000 \$5,000 \$5,000 \$8,000 \$8,000 \$3,500 \$3,500 \$8,500 \$6,500 \$6,500 \$6,500
7/1/15-6/30/16	\$13,184	\$3,000	\$6,069	\$1,420	\$4,000		- - - - - - - - - -																
7/1/14-6/30/15	\$13,330	\$1,950			\$5,500																	\$1,000	\$1,000
TERM 7/1/13-6/30/14	\$15,648	\$1,950	\$100		\$3,085																	\$200 \$200 \$200 \$200 \$200 \$200 \$200 \$200	2200
	Utilities(Elec, Water, Gas, Phone, Scavenger)	Office Supplies, Postage	Building Maintenance Supplies and Repair	Printing/Reproduction				t Out of Town)	& Out of Town) nt	l & Out of Town) ent instruction + Supplies	al & Out of Town) ent Instruction + Supplies ty Instruction (Brain Health)	al & Out of Town) lent Instruction + Supplies ty Insturction (Brain Health) ty Insturction (Zumba Gold)	al & Out of Town) hent Instruction + Supplies ity Insturction (Brain Health) ity Insturction (Zumba Gold) ity Instruction (Fitness)	al & Out of Town) hent Instruction + Supplies ity Insturction (Brain Health) ity Instruction (Fitness) istructor	al & Out of Town) lent Instruction + Supplies by Instruction (Brain Health) by Instruction (Fitness) structor tic Health	al & Out of Town) ent Instruction + Supplies by Instruction (Brain Health) by Instruction (Zumba Gold) by Instruction (Fitness) structor ic Health pplies + Travel	al & Out of Town) ent Instruction + Supplies by Instruction (Brain Health) by Instruction (Zumba Gold) by Instruction fritness) estructor ic Health pplies + Travel	il & Out of Town) ent Instruction + Supplies Instruction (Brain Health) y Instruction (Zumba Gold) y Instructor fructor ic Health plies + Travel	l & Out of Town) ent mstruction + Supplies y Instruction (Brain Health) y Instruction (Zumba Gold) y Instruction (Fitness) itructor c Health plies + Travel	l & Out of Town) ant nstruction + Supplies y Instruction (Brain Health) y Instruction (Zumba Gold) y Instruction (Fitness) itructor c Health plies + Travel plies + Travel	l & Out of Town) ent Instruction + Supplies <u>y Instruction (Brain Health)</u> <u>y Instruction (Eitness)</u> <u>ritructor</u> c Health plies + Travel	Il & Out of Town) ent Instruction + Supplies Misturction (Brain Health) y Insturction (Zumba Gold) y Instruction (Fitness) structor ic Health plies + Travel nputer Component ocial Media	Staff Training Staff Travel-(Local & Out of Town) Rental of Equipment Ongoing Activity, Instruction + Supplies Contractor, Activity Instruction (Brain Health) Contractor, Activity Instruction (Zumba Gold) Contractor, Activity Instruction (Fitness) Contractor, At Instructor Contractor, At Instructor Cont

Appendix B-5 Date: 1/19/17

HSA #3

Appendix B-5 Date: 1/1**9**/17

> Program: Community Services (Same as Line 9 on HSA #1)

Capital Expenditure Detail (Equipment and Remodeling Cost)

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ΕQU	EQUIPMENT	TERM 7	/1/13-6/30/14	7/1/14-6/30/15	T/1/13-6/30/14 7/1/14-6/30/15 7/1/15-6/30/16 7/1/16-6/30/17 7/1/17-6/30/18 7/1/13-6/30/18	7/1/16-6/30/17	7/1/17-6/30/18	TOTAL 7/1/13-6/30/18	
No.	ITEM/DESCRIPTION	, , ,							
	Commercial Range, Kitchen					\$5,500		\$5,500	1
	Stainless steel working table, Kitchen					\$840		\$840	
		i.							
TOTAL	TOTAL EQUIPMENT COST	-				\$6,340		\$6,340	-
л М М	REMODELING								
Description:	ption:								
									<u> </u>
TOTAI	TOTAL REMODELING COST								,,
					L				
TOTA	TOTAL CAPITAL EXPENDITURE	I				\$6,340		\$6,340	
(Equipm HSA #4	(Equipment and Remodeling Cost) HSA #4								

APPENDIX A-2b - SERVICES TO BE PROVIDED BY GRANTEE

On Lok Day Services Health Promotion Program - Physical Fitness & Fall Prevention July 1, 2016 to June 30, 2019

I. Purpose

The purpose of this grant is to maintain or improve the well being of high risk seniors by implementing evidence-based disease prevention and health promotion programs focusing on physical fitness and fall prevention. Such evidence based programs have proven effective in reducing risk of falls and injury, improving fitness levels, and empowering high-risk seniors to take control of personal health through lifestyle changes.

II. Definitions

Adult with Disability	Person age 18 and above with 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: self-care, receptive and expressive language, learning, mobility, self- direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment
CA-GetCare	A web-based application that provides specific functionalities for contracted agencies to perform consumer intake/assessment/enrollment, record service units, run reports, etc.
City	City and County of San Francisco, a municipal corporation
Controller	Controller of the City and County of San Francisco or designated agent
DAAS	San Francisco Department of Adult and Aging Services
Evidence-based Health Promotion Program: Physical Fitness & Fall Prevention Services	A variety of activities to maintain or improve the service population's physical health using <i>recognized evidence-based</i> physical fitness and fall prevention programs. Evidence-based refers to a program that has both sufficient research and studies to support positive program outcomes and is endorsed by one or more reputable health, scientific and/or research institutions
	Examples: A Matter of Balance: http://www.healthyagingprograms.org/content.asp?sectionid=32&ElementID =489
	EnhanceFitness: http://promisingpractices.fightchronicdisease.org/programs/detail/enhancefit ness
	<i>Tai Chi: Moving for Better Balance</i> <u>http://www.ncbi.nlm.nih.gov/pubmed/18579921</u> http://ori.org/~fuzhongl/TaiChiCDC/

	See National Council on Aging, Center for Healthy Aging's web site for more information: <u>http://www.healthyagingprograms.org/content.asp?sectionid=73</u>
	And the Center for Disease Control & Prevention: http://www.cdc.gov/ncipc/preventingfalls/
	The program should be sustainable, easily replicated and implemented in a community-based setting.
Frail	A functionally impaired older individual who is either: (a) unable to perform at least two Activities of Daily Living (ADL) or Independent Activities of Daily Living (IADL) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) having a cognitive or other mental impairment that 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
Grantee	On Lok Day Services
HSA	Human Services Agency of the City and County of San Francisco
Low-Income	100% of poverty level. 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	African-American, Hispanic, American Indian/Alaskan Native, Asian American, Pacific Islander
OOA	Office on the Aging
OCM	Office of Contract Management, San Francisco Human Services Agency
Senior	Person who is 60 years or older
SF12 perception of health questionnaire	The SF-12® is a multipurpose short-form (SF) generic measure of health status and outcome from the participant's point of view. The tool is
	developed by Quality Metric Incorporated and proven to provide valid outcome data

III. Target Population

Individuals 60 years of age or above and adults age 18 and above with disabilities. 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
- Non or limited English speaking
- Minority
- Frail
- Lesbian/Gay/Bisexual/Transgender

IV. Eligibility for Health Promotion Services

Consumer who is age 60 and above, and adults 18-59 living with a disability.

V. Location and Time of Services

The details of the sites and operation hours are to be determined with the Grantee and will be included in Site Chart with OOA's approval.

VI. Description of Services and Program Requirements

Grantee will provide evidence-based health promotion programs which have been proven to be effective in reducing older people's risk of disease, disability and injury, increase people's fitness level and empower people to take more control over their own health through lifestyle changes.

The grantee will:

- 1) Engage in **planning activities** to develop health promotion classes, training, marketing and outreach strategies in line with an established evidence-based health promotion program. A marketing-outreach plan will be provided to DAAS for review approval within 45 days after grant begins and updated semi-annually.
- Establish signed MOUs to collaborate with at least ten community partners to implement a citywide multidisciplinary health promotion program that is (a) community-based, (b) sustainable, and (c) culturally relevant to participants in the targeted communities.
- 3) **Provide workshops to train and certify or re-certify wellness trainers**. Wellness trainers are individuals who conduct strength, flexibility, low impact aerobics, balance and/or fall prevention health promotion classes. On an annual basis, continuing certified wellness trainers shall complete and have documentation for at least four hours of continuing education training through in person workshops/training or online training.
- 4) Offer health promotion classes.

Classes will be:

- A. Focused to include strength and flexibility, low impact aerobics, balance, and fall prevention;
- B. Conducted by certified wellness trainers;
- C. Offered in group settings in at least 10 locations throughout the city such as congregate meal sites, community centers, senior housing, or senior centers;
- D. Offered at least 2-3 times a week at each location, at 1-hour per session (or as per the program model dictates);
- E. Enrolled a minimum class size of 10 and maximum of 30 per trainer.
- 5) Conduct wellness program outreach in order to achieve consumer enrollment service objectives within a diverse target population. Outreach strategies will be neighborhood-based and may include activities such as disseminating materials at community meetings, other group settings or special events/fairs and announcements. Publicity for the Fall Prevention classes shall include outreach to public and private health clinics/hospitals in the community.
- 6) **Provide personal consultation for consumers enrolled in health promotion classes.** Consultations will be available to all consumers, provided by trained staff member, and will include information on exercise recommendations and designing a wellness program for the individual.
- 7) Conduct follow-up with participants to measure program outcomes.
- 8) Offer sufficient number of wellness trainer workshops to have sufficient number of certified wellness trainers to meet the number of health promotion classes offered.

9) The Grantee will have to be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules.

VII. Other Grantee Responsibilities:

- A. Grantee will administer the SF12 perception of health questionnaire to all health promotion class enrollees annually in April.
- B. Grantee will administer an annual consumer satisfaction survey to statistically significant number of health promotion class enrollees using survey tool approved by DAAS. The survey results will be shared with DAAS by March 15th.
- C. Grantee will develop and maintain current program policies and procedures with OOA approval to meet the program service standards set forth by the Office on the Aging.
- D. Grantee will collect and enter consumer and service unit data into the online CA-GetCare database in accordance to OOA program policies and procedures.
- E. Grantee will use a valid and reliable fall risk assessment tool to collect baseline data for participants in the Fall Prevention class, and to conduct post-program evaluation.
- F. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules.

VIII. Service Objectives

The total units of service and allocation by site will be shown on the OOA-approved Site Chart.

Annual Service Units:

FY 2016-17

	Service Unit
# Unduplicated consumers to be served	880
# Health promotion classes (1)	1,628
# Fall Prevention classes (2)	312
Total # Classes (1+2)	1,940
# Hours individual consultation	630

FY 2017-18 and 2018-19 for each year:

	Service Unit
# Unduplicated consumers to be served	850
# Health promotion classes (1)	1,584
# Fall Prevention classes (2)	312
Total # Classes (1+2)	1,896
# Hours individual consultation	600

- Offer one (4-hours) Wellness Trainer workshop annually
- Train 4 Wellness Trainer annually

IX. Outcome Objectives

- A. Grantee will provide quality services that attain a high satisfaction level from participants. At least <u>85%</u> of surveyed participants will be satisfied with the service delivery by staff and/or volunteers.
- B. At least <u>70%</u> of the assessed participants who participate in the program will show maintenance or improvements in functional fitness levels and maintain a 70th percentile or better score on average for each of the three validated functional fitness assessments(Functional Reach Test, Timed up and Go Test and 30 second Chair Stance Test).
- C. All the surveyed participants who participate in the program will maintain scores higher than the 50th percentile for Physical Composite Scale as measured through SF12 survey tool.

D. Using the three validated functional fitness assessment tools, at least <u>75%</u> of the assessed participants who completed the Fall Prevention class will show reduction in their risk for falls when compared to baseline data and the endpoint data at the end of the workshop.

X. Reporting Requirement

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

- A. Grantee shall input all required data into CA-GetCare on a monthly basis into the Service Recording Tool by the 5th working day of the month for the preceding month.
- B. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st.
- C. Grantee will provide an annual consumer satisfaction survey report to OOA by March 15th.
- D. Grantee shall develop and deliver ad hoc reports as requested by HSA and DAAS.
- E. Quarterly and Annual Reports will be entered into the Contracts Management System (CMS). For assistance with reporting requirements or submission of reports, contact:

Linda Lau, OOA Lead Nutritionist, <u>Linda.Lau@sfgov.org</u> Drake Herrador, HSA Contracts Manager, <u>Drake.Herrador@sfgov.org</u>

XI. Monitoring Activities

- A. <u>Program Monitoring</u>: Program monitoring will include review of 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; 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, HIPAA compliance, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

A	В	С	D	E
2			Appendix B-2b, Pag	
			Document Date:	2/1/2017
3 HUMAN SERVICES AGENCY	CONTRACT BUDGE	T SUMMARY		
4				
5 Contractor's Name	Contract Term			
6 On Lok Day Services	7/1/16-6/30/19			
7 (Check One) New Renew	al Modification _	X		
8 If modification, Effective Date of Mod. 1/				
9 Program: Health Promotion				
10 Budget Reference Page No.(s)	Health Promotion	Health Promotion	Health Promotion	Total
11 Program Term	7/1/16-6/30/17	7/1/17-6/30/18	7/1/18-6/30/19	7/1/16-6/30/19
12 HSA-DAAS Expenditures				
13 Salaries & Benefits	\$110,620	\$104,959	\$104,959	\$320,538
14 Operating Expense	\$164,264	\$133,228	\$133,228	\$430,720
15 Subtotal	\$274,884	\$238,187	\$238,187	\$751,258
16 Indirect Percentage (%)	9%	9%	9%	9%
17 Indirect Cost (Line 16 X Line 15)	\$24,740	\$21,437	\$21,437	\$67,614
18 Capital Expenditure				
19 Total HSA-DAAS Expenditures	\$299,624	\$259,624	\$259,624	\$818,872
20				
21 Non-DAAS Expenditures				
22 Salaries & Benefits	\$58,988	\$55,844	\$55,844	\$170,676
23 Operating Expense	\$16,770	\$13,626	\$13,626	\$44,022
24 Subtotal	\$75,758	\$69,470	\$69,470	\$214,698
25 Indirect Percentage (%)				2
26 Indirect Cost (Line 16 X Line 15)				
27 Capital Expenditure				
28 Total Non-DAAS Expenditures	\$75,758	\$69,470	\$69,470	\$214,698
29 30 Total DAAS & Non-DAAS Expenditure	- <u><u><u></u></u></u>	<u> </u>	\$200 00 d	<u> </u>
31	s \$375,382	\$329,094	\$329,094	\$1,033,570
32 HSA Revenues				
	0000.004			
33 General Fund	\$299,624	\$259,624	\$259,624	\$818,872
34 35				
36				
37 TOTAL HSA REVENUES	£200.624		£050 004	£040.070
	\$299,624	\$259,624	\$259,624	\$818,872
	011000			
39 Project Income	\$11,000	\$11,000	\$11,000	\$33,000
40 Fundraising	\$64,758	\$58,470	\$58,470	\$181,698
41 42				
42				
44 Total Revenues	\$375,382	\$329,094	\$329,094	\$1,033,570
45 Full Time Equivalent (FTE)				
47 Prepared by: Valorie Villela	Telephone No.:	(415) 550-2211		2/1/2017
48 HSA-CO Review Signature:				
49 HSA #1				11/15/2007

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& 100% 0% <th< td=""><td></td><td></td><td><u> </u></td><td>⊣ %</td><td>FTE</td><td>Budgeted Salary</td><td>Budgeted Salary</td><td>Budgeted Salary</td><td>7/1/16-6/30/19</td></th<>			<u> </u>	⊣ %	FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	7/1/16-6/30/19
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& \$110,620 \$104,959 & \$58,988 \$55,844 \$621,738 \$169,608 \$160,803	28								,
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		\$621,73				\$169,608	\$160,803	\$160,803	\$491,214
	34 HSA #2								11/15/2007

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8			Non-D	AAS Fun	ded Salar	Non-DAAS Funded Salaries & Benefits Detail	Detail		t
901	9 10 Non-DAAS Funded					7/1/16-6/30/17	7/1/17-6/30/18	7/1/18-6/30/19	7/1/16-6/30/19
7		Agency Totals	Totals	For HSA	For HSA Program	For DHS Program	For DHS Program	For DHS Program For DHS Program For DHS Program	TOTAL
12	POSITION TITLE	TimeSalary for FTE	Total % FTE	% FTE	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
13		\$134,191		4%	4%	\$4,923	\$4,660		\$14,243
4		\$44,803			37%	\$16,435	\$15,559	\$15,559	\$47,553
15	HEALTH & FITNESS MANAGER	\$52,998			20%	\$10,499	\$9,939	\$9,939	\$30,377
9	ADMINISTRATIVE SECRETARY	\$62,504			4%	\$2,292	\$2,171	\$2,171	\$6,634
-		\$36,856			1%	\$541	\$512	\$512	\$1,565
R		\$41,600		18%	18%	\$7,630	\$7,224	\$7,224	\$22,078
6 2 2 2	ASSISTANT DIRECTOR	\$75,005	100%	6%	%9	\$4,127	\$3,907	\$3,907	\$11,941
2									
2									
2	_	-							
5 23	TOTALS					\$46,447	\$43,972	\$43,972	\$134,391
25 25	FRINGE BENEFIT RATE	27%							
27						\$12,541	\$11,872	\$11,872	\$36,285
28									
87 OS	TOTAL DAAS SALARIES & BENEFILS					\$58,988 \$110,620	\$55,844	\$55,844	\$170,676 *320,528
31						010			occ'nzc¢
32	TOTAL DAAS & Non-DAAS SALARIES & BENEFITS*	\$621,738				\$169,608	\$160,803	\$160,803	\$491,214
33 34	HSA #2 *TOTAL DAAS & NON-DAAS SALARIES & BENEELTS REELECTS ANNITALELUL TIME SALARY EOD EACH ETE ONLY ONCE AS TO NOT DOLIDLE COUNTR	FEITS REFLE	CTS ANNI		IME SALAR	V EOP EACH ETE	. ONI V ONCE AS		11/15/2007
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8 9 10 11 H.S.A-DAAS Funded 12 Expenditure Category 13 Rental of Property 14 Utilities(Elec, Water, Gas, Phone, Scavenger) 15 Office Supplies, Postage 16 Building Maintenance Supplies and Repair 17 Printing and Reproduction 18 Insurance 19 Leader Training 20 Staff Travel-(Local & Out of Town) 21 Rental of Equipment 22 CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE	TERM 7/1/16-6/30/17 \$1,377 \$7,37 \$5,008 \$5,008 \$1,853 \$1,853 \$1,868 \$3,000 \$1,600 \$1,600 \$1,600 \$1,600	7/1/17-6/30/18 \$741 \$750 \$750 \$750 \$750 \$750 \$750 \$750 \$750	7/1/18-6/30/19 \$741 \$750 \$500 \$500 \$1,368 \$1,368 \$650 \$650 \$400	TOTAL 7/1/16-6/30/19 \$2,859 \$2,859 \$2,859 \$2,853 \$4,104 \$3,000 \$3,000 \$3,000 \$3,000 \$1,200
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XiTOTAL DAAS OPERATING EXPENSE35TOTAL Non-DAAS OPERATING EXPENSE36TOTAL DAAS & Non-DAAS OPERATING EXPENSE373738HSA #3	\$164,264 \$16,770 SE \$181,034	\$133,228 \$13,626 \$146,854	\$133,228 \$13,626 \$146,854	\$430,720 \$44,022 \$474,742 11/15/2007

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	Non-DAAS Funded Operating Expense Detail	Dperating Exper	nse Detail	
		-		
Non-DAAS Funded				TOTAL
Expenditure Category	TERM 7/1/16-6/30/17	7/1/17-6/30/18	7/1/18-6/30/19	7/1/16-6/30/19
Rental of Property				50000
Utilities(Elec, Water, Gas, Phone, Scavenger)	\$1.095	\$459	\$459	\$2 013
13 Office Supplies. Postage	\$750	\$750	\$750	\$2.250
Building Maintenance Supplies and Repair	\$5.008	\$2,500	\$2,500	\$10.008
Printing and Reproduction	\$500	\$500	\$500	\$1500
Insurance	\$1,367	\$1.367	\$1.367	\$4 101
Leader Training				
Staff Travel-(Local & Out of Town)	\$650	\$650	\$650	\$1.950
Rental of Equipment	\$400	\$400	\$400	\$1.200
20 CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE				
24 OTHER				
25 Community Living Campaign	\$7,000	\$7,000	\$7,000	\$21.000
TOTAL Non-DAAS OPERATING EXPENSE	\$16.770	\$13.626	\$13.626	\$44.022
TOTAL DAAS OPERATING EXPENSE	\$164,264	\$133,228	\$133,228	\$430,720
TAVT CURFERING OF AG				
OI TOTAL DAAS & NOIL-DAAS UPERALING EAPENSE	ISE \$181,034	\$146,854	\$146,854	\$474,742