



**SAN FRANCISCO  
HUMAN SERVICES AGENCY**

**Memorandum**

**To:** Disability And Aging Services Commission

**Through:** Kelly Dearman, Executive Director

**From:** Megan Elliott, Deputy Director  
Esperanza Zapien, Director Of Contracts

**Date:** February 4, 2026

**Subject:** New Agreement: **San Francisco In-Home Supportive Services Public Authority** (Government) For Provision Of Independent Provider Mode In-Home Supportive Services

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<b>Term:</b>	<u>Full Term</u> 7/1/26- 6/30/31	<u>Contingency</u>	<u>Total</u>		
<b>Amount:</b>	\$901,194,469	\$90,119,447	\$991,313,916		
<b>Annual Amount:</b>	<u>FY 26-27</u> \$141,570,492	<u>FY 27-28</u> \$159,306,793	<u>FY 28-29</u> \$178,717,192	<u>FY 29-30</u> \$199,615,533	<u>FY 30-31</u> \$221,984,459
<b>Funding Source:</b>	<u>County</u> \$180,238,894	<u>State</u> \$270,358,341	<u>Federal</u> \$450,597,234	<u>Contingency</u> \$90,119,447	<u>Total</u> \$991,313,916
<b>Percentage:</b>	20%	30%	50%		100%

The Department of Disability and Aging Services (DAS) requests authorization to enter into a new governmental agreement with **San Francisco In-Home Supportive Services Public Authority** for the period of July 1, 2026, to June 30, 2031, in the amount of \$901,194,469 plus a 10% contingency for a total amount not to exceed \$991,313,916. The purpose of this agreement is to support Independent Provider (IP) Mode In-Home Supportive Services (IHSS).



## Background

The In-Home Supportive Services (IHSS) Program aids eligible low-income older adults and persons with disabilities by matching them with IPs who assist them in activities of daily living. The provision of this service allows older adults and persons with disabilities to remain safely in their own homes, while encouraging independence and rehabilitation where possible. IHSS is provided through either (a) an Independent Provider (IP), or (b) a contracted agency provider for those recipients who are unable to find and/or supervise their own IPs. Since 2022, the IHSS Program has seen an 18.5% increase in IHSS recipients served, currently serving approximately 30,000 IHSS recipients, 95% of whom utilize the IP Mode of service.

This grant supports the overall operations of the San Francisco IHSS Public Authority (SF IHSS PA) including the administration of health and dental benefits, maintenance of an IP Registry, processing of criminal background checks for the IP workforce, including providing LiveScan services, operating a Mentorship Program, and staffing the activities of the IHSS Public Authority Governing Body. This Governing Body is composed of board appointed members who are responsible for advising the SF IHSS PA. State funding provides stipends for Governing Body members to support their attendance and participation.

The year-over-year growth in the contract is principally a result of projected increases in health and dental benefits for IHSS providers, plus modest increases in salaries, benefits and operating expenses to administer the IHSS Public Authority. The growth in expenditure for provider benefits is based upon two factors: 1. recent upward enrollment trends, and 2. estimated future cost inflation on healthcare services. These costs, although substantial, are largely financed via state and federal sources with the local share paid through the IHSS Maintenance of Effort (MOE) – see Funding section below.

## Services to be Provided

The SF IHSS PA is the employer of record for IPs in San Francisco for the purposes of Union negotiations and is responsible for the administration of health and dental benefits for all eligible IPs. In 2023, the SF IHSS PA concluded bargaining with SEIU 2015. The final collective bargaining agreement contract describes the IP wage schedule from July 1, 2023 through June 30, 2027, which is aligned with the City's Minimum Compensation Ordinance. The contract also states that IPs who are

authorized to work and are paid for two consecutive months (and for at least 25 hours/month) become eligible to apply for a full medical plan called Healthy Workers, administered by the San Francisco Health Plan. IPs become eligible to apply for dental care insurance after 6 months of working 25+hours/month.

In addition to the above functions, the SF IHSS PA provides several other critical services to the IHSS program. These services include the operation of an IP Registry for recipients who need help finding care providers, background investigations of new IPs including providing LiveScan fingerprinting, a Mentorship Program, and a One Stop Resource Center that provides safety and protective supplies to IPs, connection to community resources, and education regarding the use of the Registry and IHSS.

The SF IHSS PA advocates for improved quality of service, distributes educational materials, and conducts weekly recruitment and orientation presentations to expand the number and quality of IPs on the Registry. The SF IHSS PA offers training opportunities to Registry home care providers through several partnerships with community home care organizations, including Homebridge. Training courses vary in topics that include effective communication, body mechanics, and behavioral health strategies. Training also offers CPR/First Aid certification.

The Mentorship Program assists and educates referred IHSS recipients on how to hire and maintain an IP in order to successfully transition to and/or maintain independent community living. The Mentorship Program bridges the gap between the IHSS recipient's ability to independently manage a provider and the need to refer a recipient for County Contract Mode services. In addition, the mentors facilitate the discharge of IHSS recipients from Laguna Honda Hospital over a 60-day transition period, half of which is spent on instructing IHSS recipients on how to flourish in their homes and communities. The Mentorship program is partially supported through a work order from the Department of Public Health.

## Selection

Per Administrative Code §1.25, agreements between government entities are exempt from competitive solicitation requirements. The San Francisco In-Home Supportive Services Public Authority, a governmental agency created under SF Administrative Code Chapter 70 and established by the Board of Supervisors pursuant to California Welfare & Institutions Code § 12301.6, was formed in 1995. Since its creation, the Public

Authority has partnered with the Human Services Agency (HSA) to provide IHSS-related services.

## Funding

Funding for this agreement is provided through Federal, State, and County General Funds, with the local portion paid to the State through San Francisco's IHSS Maintenance of Effort (MOE).

## Attachments

Appendix A, Scope of Services

Appendix B, Budget

**Appendix A – Services to be Provided  
San Francisco IHSS Public Authority  
Independent Provider Mode – In-Home Supportive Services  
July 1, 2026 – June 30, 2031**

**I. Purpose of Agreement**

The purpose of the agreement is to improve services under the Independent Provider Mode for In-Home Supportive Services (IHSS) recipients in the City and County of San Francisco. In order to accomplish this goal, the major service areas are:

- A.** Maintaining an Independent Provider worker registry;
- B.** Providing and administering health and dental benefits for Independent Providers;
- C.** Participating in Independent Provider group orientation as needed, conducting LiveScans and processing of criminal background checks of potential Independent Providers;
- D.** Providing a Mentorship Program for IHSS Recipients
- E.** Providing a One Stop Resource Center for IHSS recipients and Independent Providers, which includes trainings for IHSS recipients and providers, distribution of limited safety and protective supplies, Bus Passes, and Provider ID Cards to Independent Providers;
- F.** Providing stipends to Union Stewards for performance of Union related activities in accordance with the current Collective Bargaining Agreement between SEIU 2015 and Contractor; and
- G.** Staffing and coordinating the activities of the San Francisco IHSS Public Authority Governing Body.

**II. Definitions**

ACL	All County Letter
CARBON	SFHSA’s web-based Contracts Administration, Reporting, and Billing On-line System
CDSS	California Department of Social Services
City	City and County of San Francisco, a municipal corporation
CMIPS	Case Management Information and Payroll System, the statewide IHSS database
COBRA	Consolidated Omnibus Reconciliation Act of 1985
CORI	Criminal offender record information
DAS	Department of Disability and Aging Services
IHSS	In-Home Supportive Services

IHSS Eligible	An individual who is currently: (1) an IHSS recipient; or (2) a Medi-Cal recipient and has applied for In Home Supportive Services through the San Francisco Department of Disability and Aging Services.
IP	Independent Provider of IHSS
IPAC	Independent Provider Assistance Center
Mentee	An IHSS recipient who receives PA Mentorship Services.
Mentor	A Public Authority employee familiar with IHSS and/or other Medi-Cal services from either previous work experience or personal experience as a Recipient or Provider.
PEAU	Provider Enrollment Appeals Unit
Recipient	An individual who has been assessed and authorized by DAS Social Workers to receive personal care, domestic, and related services through the San Francisco IHSS Program.
SFHSA	San Francisco Human Services Agency
SNF	Skilled Nursing Facilities such as Laguna Honda Hospital
SOC 852	Notice to Applicant Provider of Provider Ineligibility Due to Tier 1 Crimes (SOC 852)
SOC 852 A	Notice to Applicant Provider of Provider Ineligibility Due to Tier 2 Crimes (SOC 852A)
SOC 855 A	Notice to Recipient of Provider Ineligibility Due to Tier 1 Crimes (SOC 855A)
SOC 855 B	Notice to Recipient of Provider Ineligibility Due to Tier 2 Crimes (SOC 855B)
SOC 856	To Request an Appeal (SOC 856)
SOC 857	Notice to Recipient of Provider Eligibility County/PA/NPC Acknowledgement of Receipt of Waiver (SOC 857)
SOC 858 A	Notice to Provider of Provider Ineligibility—Tier 1 Crimes Ineligibility—Subsequent Conviction (SOC 858A)
SOC 858 B	Notice to Provider of Provider Ineligibility—Tier 2 Crime Ineligibility—Subsequent Conviction (SOC 858B)

SOC 859 A	Notice to Recipient of Provider Ineligibility—Tier 1 Crimes Ineligibility—Subsequent Conviction (SOC 859A)
SOC 859 B	Notice to Recipient of Provider Ineligibility—Tier 2 Crimes Ineligibility—Subsequent Conviction (SOC 859B)
SOC 862	IHSS Recipient Request for Provider Waiver form (SOC 862)
SOC 863	IHSS Applicant Provider Request for General Exception form (SOC 863)
SOC 881	IHSS Provider Request to Remain Active in CMIPS
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 ( <i>Chapter 104, Sections 104.1 through 104.9</i> ).
Tier 1	W & I Code Section 12305.81 – which prohibits any individual who in the last 10 years has been convicted of, or incarcerated following a conviction for, a crime involving fraud against a government health care or supportive services program, or a violation of subdivision (a) of section 273a of the Penal Code (PC) (abuse of a child under circumstances/conditions likely to produce great bodily harm or death), or Section 368 of the PC (abuse of an elder or dependent adult), or similar violations in another jurisdiction. (apply to felony and misdemeanor offenses.)
Tier 2	Exclusionary crimes including: W&IC section 12305.87 and include the following: – A violent or serious felony, as specified in PC section 667.5(c), and PC section 1192.7(c); – A felony offense for which a person is required to register as a sex offender, pursuant to PC section 290(c); and

	– A felony offense for fraud against a public social services program, as defined in W&IC section 10980(c)(2) and (g)(2).
Vendors	Entities contracted with IHSS-PA for Health and Dental Benefits

**III. Target Population**

This program is designed to serve all people who can benefit from the services outlined in this Appendix, and particularly those demonstrating the greatest economic and social need. To ensure that the most vulnerable people are aware of and can benefit from this program, The San Francisco IHSS Public Authority shall ensure that program services are accessible to:

- A. Persons with low to moderate income
- B. Persons who are socially isolated
- C. Persons with limited English-speaking proficiency
- D. Persons from communities of color or communities that have historically been under-served
- E. Members of the LGBTQIA+ community
- F. Persons at risk of institutionalization
- G. Worker Registry: The Registry target populations consist of all IHSS Recipients of the San Francisco IHSS program, all individuals who are already working as IPs, as well as individuals who are seeking employment as an IP.
- H. IHSS Provider Benefits Administration Service: The target population consists of IHSS IPs enrolled with IHSS and who meet eligibility requirements to enroll in the health and dental benefits provided by the San Francisco IHSS Public Authority as defined by the Collective Bargaining Agreement between SEIU 2015 and the Contractor.
- I. Independent Provider Enrollment Service: The target population consists of individuals who apply to become IPs in the San Francisco IHSS program. Applicants who clear all State requirements to become IPs are then enrolled to provide IHSS home care services.
- J. IHSS Mentorship Services: IHSS-eligible Recipients in the process of discharging from institutional-living settings to community living in San Francisco; or Current Recipients who are in need of short-term support to remain living independently in the community; and Current Recipients who need help hiring and managing an IP.
- K. One Stop Resource Center: IPs of IHSS in need of additional support and training around working with IHSS Consumers, self-care, and professional home care strategies and techniques. Community Support Staff in search of additional information and resources related to IHSS.
- L. Union Shop Steward Payment for Union Activities: Maximum of eleven (11) IP Union Stewards annually identified by SEIU 2015 of performing activities falling within the scope of representation of IHSS IPs. These Union Stewards will receive stipends and will not be considered employees of the Contractor,

nor will the San Francisco IHSS Public Authority be responsible for the Union Stewards' performance of activities for which they receive a stipend.

- M.** San Francisco IHSS Public Authority Governing Body: IHSS Recipients over the age of 55 years, authorized to represent organizations that advocate for aging adults. IHSS Recipients between the ages of 18 and 60 years, authorized to represent organizations that advocate for younger people with disabilities. IHSS Providers who provide personal assistance services to an IHSS recipient. Members of the DAS, DPH, HSA, MOD Commissions.

#### **IV. Description of Services**

San Francisco IHSS Public Authority shall provide the following services during the term of this contract:

##### **A. Worker Registry**

Registry services are intended to benefit Recipients by aiding them in hiring an IP who comes as close as possible to meeting their individual needs, so that they can form a stable employer relationship with the IP.

- (1) San Francisco IHSS Public Authority shall design and maintain a Registry database of IPs who have cleared Registry screening, IHSS IP enrollment and basic training. The Registry database will serve the purpose of compiling appropriate referral lists for IHSS Recipients who request such assistance.
- (2) San Francisco IHSS Public Authority shall recruit and enroll IPs to the Registry on an ongoing basis, ensuring both the number and diversity of active Registry IPs best meets the service and language needs of IHSS Recipients. The demographics of registry IPs should reflect the cultural and linguistic makeup of the IHSS recipient population using the Registry.
- (3) San Francisco IHSS Public Authority shall encourage Registry IPs to participate in personal care assistance training offered through the DAS funded IP Training Program.
- (4) San Francisco IHSS Public Authority shall receive referrals from DAS Social Workers for Recipients in need of Registry services. Recipients may also self-refer to the Registry.
- (5) Within two business days of receipt of a Registry referral, San Francisco IHSS Public Authority shall call and attempt to assist the Recipient in finding an IP by conducting a brief screening to ascertain the Recipient's needs and preferences in order to provide a list of IPs for possible hire.
- (6) San Francisco IHSS Public Authority shall email or mail Recipients with a list of at least 5 Registry IPs, whose skills match the Recipient's service and language needs as closely as possible, immediately following the phone screening.

- (7) will identify Recipients who need help in the hiring process and refer them to the Mentorship Program.
- (8) San Francisco IHSS Public Authority shall refer Registry Recipients who are unable to hire an IHSS IP and who may need IHSS Contract Mode services to the appropriate IHSS Social Worker.
- (9) San Francisco IHSS Public Authority shall conduct (2) follow ups with Registry Recipients within 15 and 30 business days after sending out a list to determine how things are going and if the recipient has hired from the list. Follow-up shall be documented.

#### San Francisco IHSS Public Authority Responsibilities

- (1) San Francisco IHSS Public Authority shall analyze demographics of IHSS recipient and Registry IP populations at least quarterly. If Registry IP demographics do not match those of Registry Recipients, the Registry will demonstrate efforts to recruit a more culturally and linguistically representative Registry group.
- (2) San Francisco IHSS Public Authority shall check in with Registry IPs monthly to verify their continued interest and eligibility for the program.
- (3) San Francisco IHSS Public Authority will intervene with Registry IPs who have a documented pattern of not calling back or showing up for interviews with Registry Recipients by providing training, coaching and possible termination from Registry.
- (4) San Francisco IHSS Public Authority will track numbers of users of Registry services on a daily, weekly, and monthly basis.
- (5) San Francisco IHSS Public Authority will ensure the Registry database contains at least 5 active and available Providers who match Recipient needs/preferences for each list requested by a Registry user. Recruitment will be made through outreach and presentations as necessary to maintain Registry size and diversity.
- (6) San Francisco IHSS Public Authority shall develop policy guidelines for referring Recipients and IPs to the Union and/or the Independent Provider Assistance Center (IPAC) for questions regarding union contract or contact info, timesheets, or payroll. San Francisco IHSS Public Authority shall ensure Registry staff are knowledgeable about IPAC services, and there is a clear protocol for referring questions/issues to the Union or IPAC.

- (7) San Francisco IHSS Public Authority shall require that potential Registry IPs applying to be active on the Registry have met all legal requirements to become an IHSS IP, including having passed a Department of Justice criminal background check, as well as verifying that they are active in Case Management Information and Payroll System (CMIPS).
- (8) San Francisco IHSS Public Authority shall require that all IPs joining the Registry attend a Registry orientation, either virtually or in-person.
- (9) San Francisco IHSS Public Authority shall maintain policies and procedures relating to the conduct of both IHSS Registry Recipients and Registry IPs. The San Francisco IHSS Public Authority shall implement a protocol by which IPs and Recipients who do not follow established rules and guidelines including but not limited to: assault, threats of violence, harassment, repeated timesheet fraud, theft, and other major violations may no longer utilize Registry services. San Francisco IHSS Public Authority and DAS staff will inform each other of conduct problems of Recipients and IPs and collaboratively address issues. Documentation of violations and determinations will be maintained through this process and retained for monitoring.
- (10) San Francisco IHSS Public Authority shall notify the assigned DAS Social Worker by email the same day a Registry list has been sent to a recipient, and shall retain documentation for monitoring.
- (11) San Francisco IHSS Public Authority will maintain records for reporting purposes of the following: Outcomes for registry Recipients seeking to connect with an IP, IHSS Social Worker notifications (both initial and follow-up), as well as Recipients decisions about termination of services for Recipients or Providers with violations mentioned in bullet (9) above.

**B. IHSS Provider Benefits Administration Service**

San Francisco IHSS Public Authority shall provide the following services during the term of this contract:

- (1) Regular analysis and maintenance of IP eligibility for health and dental benefits;
- (2) Dissemination of IP enrollment information and applications;
- (3) Information and referral services for IP health and dental coverage questions;
- (4) Assistance to IPs during open enrollment to add and/or change coverage;
- (5) Enrollment of IPs into benefits upon receipt of health and dental applications;

- (6) Termination of benefits for IPs who become ineligible; and
- (7) Collaboration with vendors to update eligibility list and notify all potential COBRA beneficiaries of available benefits within 30 days.

San Francisco IHSS Public Authority Responsibilities

- (1) San Francisco IHSS Public Authority shall receive and review all enrollment applications to determine eligibility for health and dental insurance coverage. (If the application is submitted before the 12<sup>th</sup> of each month, coverage will start on the 1<sup>st</sup> of the following month.)
- (2) San Francisco IHSS Public Authority shall notify vendor of IPs of enrollment status. Vendor will mail out the welcome application packets to eligible IPs.
- (3) San Francisco IHSS Public Authority shall follow procedures to ensure that all qualified IPs have proper health and dental insurance coverage.
- (4) San Francisco IHSS Public Authority shall notify IPs when they are at risk of losing health and dental benefits due to work reduced hours.
- (5) San Francisco IHSS Public Authority shall respond promptly to IP inquiries regarding health and dental insurance coverage.
- (6) San Francisco IHSS Public Authority shall assist IPs with resolving discrepancies of coverage.
- (7) San Francisco IHSS Public Authority shall ensure that all records pertaining to health and dental insurance are safely stored.
- (8) San Francisco IHSS Public Authority shall collect and analyze benefit participation/utilization data for monthly, quarterly and annual reports to DAS.

**C. Independent Provider Enrollment Service**

San Francisco IHSS Public Authority shall:

- (1) Provide free and/or low-cost fingerprinting services to IP population at Contractor's office during specified business hours;
- (2) Receive Criminal Offender Record Information (CORI) for all applicants to ensure that State eligibility requirements are met for their enrollment as IPs;
- (3) Respond to all applicant requests regarding criminal background check status;
- (4) Update CMIPS of all eligible and ineligible IPs;

- (5) Process all Provider appeals of criminal background check results; and
- (6) Communicate with IPs who have not worked for 12 months regarding continued eligibility.

San Francisco IHSS Public Authority Responsibilities

- (1) LiveScan services
  - a. Maintain certification to perform LiveScan services.
  - b. Maintain LiveScan equipment and trained staff to provide fingerprinting services.
  - c. Accept payments and provide receipts for services rendered, unless covered by budgeted free fingerprinting.
  - d. Provide LiveScan services during consistent and published times at Contractor's office.
- (2) Provider CORI information
  - a. San Francisco IHSS Public Authority shall analyze CORI from the DOJ for Tier 1 or Tier 2 Convictions.
  - b. San Francisco IHSS Public Authority shall determine individual eligibility for IHSS service provision.
  - c. San Francisco IHSS Public Authority shall enter individual eligibility information into CMIPS.
    - i. San Francisco IHSS Public Authority shall develop procedures to ensure that IPs who have gone through the fingerprinting process have an accurate record in CMIPS such as SSN, name and address.
  - d. San Francisco IHSS Public Authority shall notify recipient and prospective IPs of eligibility determination using appropriate State notification forms.
  - e. Per ACL 10-05, San Francisco IHSS Public Authority shall:
    - i. Destroy criminal history record information immediately following determination of applicants who have cleared.
    - ii. Retain the criminal history record information of applicants who are disqualified based on a criminal record for a period of one year, for purposes of any legal appeal the provider may file.
- (3) Applicant requests
  - a. San Francisco IHSS Public Authority shall develop and implement procedures to respond to fingerprint status inquiries in a timely fashion.
- (4) Appeals
  - a. San Francisco IHSS Public Authority shall develop and implement procedures to receive applicant appeals and respond to questions regarding appeals.
  - b. San Francisco IHSS Public Authority shall forward all appeals to the state Provider Enrollment Appeals Unit (PEAU).

- c. San Francisco IHSS Public Authority shall share CORI information with the PEAU, applicant, and recipient according to State IHSS regulations.

(5) Inactive Providers

- a. San Francisco IHSS Public Authority shall send form SOC 881 via mail to IPs who have not submitted timesheets in 12 months.
- b. San Francisco IHSS Public Authority will deactivate IPs who do not request to remain active in CMIPS.

**D. IHSS Mentorship Services**

San Francisco IHSS Public Authority shall:

(1) Outreach and Referral

- a. San Francisco IHSS Public Authority will develop an outreach plan to inform Skilled Nursing Facilities (SNFs), IHSS Recipients, DAS Social Workers, and other community partners how individuals can access the IHSS Recipient Mentoring Services.
- b. San Francisco IHSS Public Authority will conduct sufficient outreach to achieve an annual unduplicated population of 100 Mentees.

(2) Receipt of Mentee referrals

- a. San Francisco IHSS Public Authority will receive referrals from PA Registry Staff, IHSS Social Workers, and SNFs for target population.
- b. San Francisco IHSS Public Authority will engage with potential Mentee within 3 business days of receiving the referral.

(3) Mentee Assessment

- a. San Francisco IHSS Public Authority will conduct a Mentorship Intake to understand the Mentee's goals within IHSS. After assessment, Mentee will be matched with a Mentor to provide training and assistance with hiring, getting care started, and retaining an IP.

(4) Recipient Training

- a. San Francisco IHSS Public Authority will provide training and coaching on how to be a successful employer of an IP. Provide training on topics such as "Finding an IP", "Getting Started with an IP" and "Communications Strategies."

(5) Skilled Nursing Facility Discharge Mentoring

- a. San Francisco IHSS Public Authority will assist IHSS-eligible Recipients in the process of discharging from SNFs with hiring and training IPs or working with Contract Mode Home Care Providers.
- b. San Francisco IHSS Public Authority will provide coaching on how to be a successful employer of an IP or a successful user of IHSS Contract Mode.

## San Francisco IHSS Public Authority Responsibilities

- (1) Skilled Nursing Facility Discharge mentoring
  - a. San Francisco IHSS Public Authority will provide Mentors to work with Mentees leaving SNFs on topics that will include, but not be limited to:
    - i. Accessing community-based resources;
    - ii. Hiring, managing, and retaining IPs;
    - iii. Accessing and using public transportation;
    - iv. Review and discuss authorized service needs.
  
- (2) San Francisco IHSS Public Authority will assist Mentee and IP with planning homecare after discharge.
  - a. Assist to coordinate start date for IP's employment; and
  - b. Assist in developing IP's regular schedule.
  
- (3) San Francisco IHSS Public Authority will contact Mentee one (1) month and three (3) months after discharge from the facility to assess the Mentee's satisfaction with the mentorship services and to determine the level of stability in living in the community. Additional earlier follow up may also be conducted, if necessary. All follow up activities will be documented in recipient records.
  
- (4) Mentee Records
  - a. San Francisco IHSS Public Authority will create records for all Mentees accessing Mentorship Services. Mentee Records will include:
    - i. Mentorship Intake
      1. Assessment of Mentee hiring needs
      2. Notes on interviewing and hiring process
      3. Outcome of hiring attempts
    - ii. Mentee training records
      1. List of training modules provided
      2. Documentation of provided training
    - iii. All staff contact with and about Mentee will be documented in case notes. This includes in-person visits, phone calls and collateral contacts with other agencies etc.
  
- (5) Mentor Recruitment and Qualification
  - a. San Francisco IHSS Public Authority will recruit and maintain an adequate number of Mentors to meet the annual Service Objectives.
  - b. Mentors will complete Mentorship training prior to providing services.
  
- (6) Mentor Training
  - a. San Francisco IHSS Public Authority will develop a training curriculum specific to the needs of new IHSS Mentors.
  - b. San Francisco IHSS Public Authority will provide all new Mentors with training.

- c. San Francisco IHSS Public Authority will maintain records of Mentor training attendance.

### **E. One Stop Resource Center**

San Francisco IHSS Public Authority shall:

- (1) Provide a resource center that is accessible to target population digitally, telephonically and on-site during regular business hours.
- (2) Design, implement and evaluate safety and protective supplies distribution pilot as required in the current IP Collective Bargaining Agreement between SEIU 2015 and Contractor.

### **San Francisco IHSS Public Authority Responsibilities**

- (1) San Francisco IHSS Public Authority will ensure that trainings and resources contain relevant and up-to-date information for Recipients and IPs.
- (2) San Francisco IHSS Public Authority will conduct outreach and marketing to ensure IHSS Recipients and IPs are aware of trainings and workshops.
- (3) San Francisco IHSS Public Authority will ensure resources in One Stop Center are relevant to IHSS Recipients and IPs and are up-to-date. Staff in the One Stop Resource Center, will be knowledgeable about IHSS and available resources and will make referrals and linkages to needed community services.
- (4) San Francisco IHSS Public Authority will develop and implement policies and procedures to ensure equitable distribution of safety and protective supplies to IPs.

### **F. Union Shop Steward Payment for Union Activities**

San Francisco IHSS Public Authority shall:

- (1) SEIU 2015 will recruit, train and monitor eleven (11) Union Stewards to perform Union related activities such as:
  - a. negotiations;
  - b. maintaining a Union visibility at the Public Authority Office that does not unreasonably interfere with office activities;
  - c. having a role in new provider orientations to inform applicants about the Union;
  - d. representing IPs who have grievances or problems;
  - e. posting information on the bulletin board provided for the Union; and
  - f. assisting IPs with navigating the IHSS program.
- (2) Monthly SEIU 2015 will track and submit to San Francisco IHSS Public Authority up to eight (8) hours performed by the identified Union Stewards in a mutually agreeable format and time.
- (3) San Francisco IHSS Public Authority will provide individual stipend checks to Union Stewards upon receipt of approved hours within a mutually agreeable time.

San Francisco IHSS Public Authority Responsibilities

- (1) Develop and implement a process with SEIU 2015 to identify, track and pay stipends to up to eleven (11) Union Stewards for up to 8 hours of authorized Union activity per month.
- (2) Ensure that each identified Union Steward receives and signs proper independent San Francisco IHSS Public Authority forms and documentation.
- (3) Distribute checks to individual IP Union Stewards who have been identified and verified to have performed authorized hours by SEIU 2015.
- (4) Keep accurate and compliant records of stipend program.

**G. San Francisco IHSS Public Authority Governing Body**

The IHSS Public Authority Governing Body is established in Chapter 70 of San Francisco’s Administrative Code and functions as a board with responsibility for providing high level direction to the IHSS Public Authority. The members of the Governing Body are appointed by the Board of Supervisors and must reside in San Francisco. Additionally, members must have familiarity with, or knowledge of personal assistance services; the capacity to understand their role to aid and assist the IHSS Public Authority in the administration of its duties; and the ability to participate in regularly scheduled meetings. The San Francisco IHSS Public Authority is responsible for supporting and coordinating the activities of the Governing Body.

San Francisco IHSS Public Authority shall:

- (1) Recruit and appoint members of the Governing Body to fill the 13 membership seats designated by the Board of Supervisors.
- (2) Adhere to the enacted Governing Body Bylaws.
- (3) Facilitate six (6) Governing Body Meetings throughout the year.
- (4) Facilitate quarterly Finance Committee meetings to review fiscal budgets and planning.

San Francisco IHSS Public Authority Responsibilities

- (1) Appoint and conduct annual performance evaluations of the Public Authority Executive Director.
- (2) Review and approve annual program and operating budgets.
- (3) Review and approve annual fiscal audit.
- (4) Report on Commission action items that affect the IHSS community.

**V. Location and Time of Services**

**Address:**

832 Folsom St. 9<sup>th</sup> floor, San Francisco, CA 94107

**Office Hours:**

Monday – Friday: 9am-5pm (closed 12pm-1pm)

Livescan Hours (by appt) Tuesday – Thursday: 9:30am – 4:20pm  
PPE Pick-Up (by appt) Monday: 10am – 3pm  
ID Cards Monday: 10am – 12pm

**VI. Service Objectives**

On an annual basis, San Francisco IHSS Public Authority shall meet the following service objectives:

**A. Worker Registry**

- (1) San Francisco IHSS Public Authority will provide Registry lists to at least 1,000 unduplicated Recipients annually.
- (2) San Francisco IHSS Public Authority will maintain a 1:5 ratio of diverse IPs on the Registry at any given point in time. (of Registry Recipients to IPs on list)

**B. IHSS Provider Benefits Administration**

- (1) 100% of eligible IPs will receive health, dental, and/or COBRA enrollment packets within 30 days of when the San Francisco IHSS Public Authority receives CMIPS data.

**C. Independent Provider Enrollment Service/Fingerprinting**

- (1) 100% of all Criminal Offender Record Information will be processed by the San Francisco IHSS Public Authority within 5 working days of receipt.
- (2) San Francisco IHSS Public Authority will complete at least 500 LiveScans annually.

**D. IHSS Recipient Mentorship Program**

- (1) San Francisco IHSS Public Authority will serve at least 100 unduplicated Mentees annually. Served means engagement with Mentorship Services and completion of Mentorship Intake.
- (2) San Francisco IHSS Public Authority will assist at least 20 unduplicated Mentees in discharging from long-term care institutions to independent living annually.

**VII. Outcome Objectives**

On an annual basis, San Francisco IHSS Public Authority will meet the following service objectives:

**A. Worker Registry**

- (1) 75% of Recipients using Registry services will have an active Provider (as verified in CMIPS II) within 60 days of receiving their first list. (Pending data points in CMIPS to measure this outcome)
- (2) In a written survey approved by HSA and conducted by the Contractor, a minimum of 85% of the Recipients will indicate:
  - a. General satisfaction with the Registry services provided (4 or 5 on a five point scale.) Recipients state they feel safe in the care of the Providers (4 or 5 on a five point scale.)

**B. IHSS Provider Benefits Administration**

- (1) 100% of qualified IPs submitting enrollment packets will be subsequently enrolled into appropriate plans.

**C. Independent Provider Enrollment Service/Fingerprinting**

- (1) 100% of criminal background checks will be appropriately and stringently processed to ensure recipient safety.

**D. IHSS Recipient Mentoring Service**

- (1) 75% of Mentees will have an active IP within 90 days of engagement in Mentorship Services. (Pending data points in CMIPS to measure this outcome)
- (2) 90% of Mentees who started Mentorship services while residing in a SNF will report that their Mentor helped them transition from SNF care to IHSS services.
- (3) 90% of Mentees report general satisfaction with the Mentorship services (4 or 5 on a five point scale).

**VIII. Data Collection and Reporting Requirements**

- A. San Francisco IHSS Public Authority will provide a monthly report of activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. San Francisco IHSS Public Authority will enter the monthly metrics in the CARBON database by the 15th of the following month.
- B. San Francisco IHSS Public Authority will provide an annual report summarizing the agreement activities, referencing the tasks described in Section VI & VII- Service and Outcome Objectives. This report will also include accomplishments and challenges encountered by the Contractor. San Francisco IHSS Public Authority will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
- C. San Francisco IHSS Public Authority will send the following data points on a monthly and quarterly basis to the County by the 15th of the following month:

(1) Worker Registry:

- a. Recipients: number of referrals, number/percentage of Recipients engaged in services, number of lists sent to Recipients, Average # of lists sent to Recipients, and number/percentage of Recipients who were referred in the past 60 days and had 1+ provider linked.
- b. Providers: Number of Registry provider applications received, number of registry Providers onboarded, number of “active” registry Providers, Providers, number of Registry Providers not actively seeking work (employed with 1+ Recipients) and average length between application to acceptance on Registry.

(2) Health and Dental Benefits:

- a. Number of eligible Providers, number of enrollment packets sent, percentage of packets sent to eligible Providers, number of submitted

packets, number of enrollments, percentage of enrollments of Providers that submitted packets, number of terminations, number of disenrollments, and percentage of eligible Providers enrolled in benefits.

- (3) LiveScan and Criminal Background Checks:
  - a. Number of records processed, number of tier 1 & 2, number of LiveScans completed, percentage of records processed within 5 days.
- (4) Mentorship:
  - a. Number of referrals from SNFs, number of referrals from DAS/Registry, number of referrals from community partners, number of self-referrals, number of hospital discharges, number of Mentorship Intakes completed, number of Mentees paired with a Mentor.
- (5) One-Stop Resource Center:
  - a. Number of One-Stop Resource Center workshop and training attendees number of trainees that found the training or workshop helpful, number of trainings and workshops offered, number of users (drop-in and telephone) of the One Stop Center, and number of Consumers and Providers who received resource assistance (in-person or virtually)
  - b. Number of personal protective equipment (PPE) distributed, and number of Provider identification badges produced.
  - c. Number of recruitment events and attendees
- (6) IHSS Public Authority Governing Body
  - a. Coordinate and staff 6 public meetings a year.
  - b. Ensure all Governing Body membership seats are filled and that appointed representatives meet the criteria that is detailed in Chapter 70 of the Administrative Code.

**D.** San Francisco IHSS Public Authority will enter the following services measures monthly into the CARBON system:

- (1) Worker Registry: Number of unduplicated Recipients to whom Registry lists was provided.
- (2) IHSS Provider Benefits Administration: Number of qualified IPs submitting enrollment packets who are subsequently enrolled into appropriate plans.
- (3) Independent Provider Enrollment Service: Number of Criminal Offender Records processed by the San Francisco IHSS Public Authority during reporting month.
- (4) IHSS Recipient Mentoring Service: Number of unduplicated Mentees served during reporting month.
- (5) Governing Body: Number of meetings staffed and coordinated

**E.** San Francisco IHSS Public Authority will provide Ad Hoc reports as required by the Department.

**F.** Quarterly and Annual Reports will be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system.

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

[Tara.Alvarez@sfgov.org](mailto:Tara.Alvarez@sfgov.org)

Contract Manager, Office of Contract Management, SFHSA

or

[Michael.Powell@sfgov.org](mailto:Michael.Powell@sfgov.org)

Program Support Analyst, In-Home Supportive Services Program  
and

[Jessie.Latch@sfgov.org](mailto:Jessie.Latch@sfgov.org)

Program Manager, In-Home Supportive Services Program, SFHSA

**IX. Monitoring Activities**

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

**HUMAN SERVICES AGENCY BUDGET SUMMARY  
BY PROGRAM**

<b>Grantee/Contractor: San Francisco In Home Supportive Services Public Authority</b>						Full Term:	7/1/26 - 6/30/31
<b>Program: Independent Provider Mode</b>						Effective Date:	
New <input checked="" type="checkbox"/> Modifier <input type="checkbox"/> Revisor <input type="checkbox"/> (Check One)						Modification #	
	7/1/26 - 6/30/27	7/1/27 - 6/30/28	7/1/28 - 6/30/29	7/1/29 - 6/30/30	7/1/30 - 6/30/31	7/1/26 - 6/30/31	
<b>Expenses</b>	<b>Original</b>	<b>Original</b>	<b>Original</b>	<b>Original</b>	<b>Original</b>	<b>Total</b>	
Salaries & Benefits	\$3,802,623	\$3,916,464	\$4,033,919	\$4,155,266	\$4,279,671	\$20,187,943	
Operating-Direct	\$1,396,073	\$1,346,973	\$1,363,322	\$1,380,129	\$1,397,411	\$6,883,908	
<b>Subtotal</b>	<b>\$5,198,696</b>	<b>\$5,263,437</b>	<b>\$5,397,241</b>	<b>\$5,535,395</b>	<b>\$5,677,082</b>	<b>\$27,071,851</b>	
Indirect Percentage (%)	15%	15%	15%	15%	15%	15%	
Indirect Costs (Line 16 X Line 15)	\$779,804	\$789,516	\$809,586	\$830,309	\$851,562	\$4,060,777	
Consultant/Subcontractor (\$50,000+)	\$122,500	\$115,100	\$117,500	\$120,125	\$125,829	\$601,054	
Direct Client Pass-Through	\$135,404,492	\$153,127,740	\$172,381,865	\$193,118,704	\$215,318,986	\$869,351,787	
Capital Expenses	\$65,000	\$11,000	\$11,000	\$11,000	\$11,000	\$109,000	
<b>Total Expenses</b>	<b>\$141,570,492</b>	<b>\$159,306,793</b>	<b>\$178,717,192</b>	<b>\$199,615,533</b>	<b>\$221,984,459</b>	<b>\$901,194,469</b>	
<b>HSA / DAS Revenues</b>							
General Fund	\$28,314,098	\$31,861,359	\$35,743,438	\$39,923,107	\$44,396,892	\$180,238,894	
State	\$42,471,148	\$47,792,038	\$53,615,158	\$59,884,660	\$66,595,338	\$270,358,341	
Federal	\$70,785,246	\$79,653,397	\$89,358,596	\$99,807,767	\$110,992,230	\$450,597,234	
<b>Total HSA / DAS Revenues</b>	<b>\$141,570,492</b>	<b>\$159,306,793</b>	<b>\$178,717,192</b>	<b>\$199,615,533</b>	<b>\$221,984,459</b>	<b>\$901,194,469</b>	
<b>Grantee/Contractor Revenues</b>							
<b>Total Grantee/Contractor Revenues</b>							
<b>Total Revenues</b>	<b>\$141,570,492</b>	<b>\$159,306,793</b>	<b>\$178,717,192</b>	<b>\$199,615,533</b>	<b>\$221,984,459</b>	<b>\$901,194,469</b>	
<b>Prepared by and Date:</b>							
<i>Telephone No. &amp; Email:</i>						<i>HSA Budget Form (3/24)</i>	

Grantee/Contractor: San Francisco In Home Supportive Services Public Authority  
 Program: Independent Provider Mode

Appendix B, Page 2

Salaries & Benefits Detail

POSITION TITLE	Agency Totals		HSA Program		7/1/26 - 6/30/27		Agency Totals		HSA Program		7/1/27 - 6/30/28		Agency Totals		HSA Program		7/1/28 - 6/30/29		Agency Totals		HSA Program		7/1/29 - 6/30/31		7/1/26 - 6/30/31						
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Annual Full Time Salary for FTE	Total FTE				
																												Total			
Executive Director (90/10GB)	\$214,600	1.00	100%	1.00	\$214,600	\$221,000	1.00	100%	1.00	\$221,000	\$227,600	1.00	100%	1.00	\$227,600	\$234,400	1.00	100%	1.00	\$234,400	\$241,400	1.00	100%	1.00	\$241,400	\$241,400	1.00	100%	1.00	\$241,400	\$1,139,000
Director of Finance & Admin (80/20)	\$158,400	1.00	100%	1.00	\$158,400	\$163,200	1.00	100%	1.00	\$163,200	\$168,100	1.00	100%	1.00	\$168,100	\$173,100	1.00	100%	1.00	\$173,100	\$178,300	1.00	100%	1.00	\$178,300	\$178,300	1.00	100%	1.00	\$178,300	\$841,100
Deputy Director	\$165,800	1.00	100%	1.00	\$165,800	\$170,800	1.00	100%	1.00	\$170,800	\$175,900	1.00	100%	1.00	\$175,900	\$181,200	1.00	100%	1.00	\$181,200	\$186,600	1.00	100%	1.00	\$186,600	\$186,600	1.00	100%	1.00	\$186,600	\$880,300
Salesforce Admin / Data Analyst	\$98,700	1.00	100%	1.00	\$98,700	\$101,700	1.00	100%	1.00	\$101,700	\$104,800	1.00	100%	1.00	\$104,800	\$107,900	1.00	100%	1.00	\$107,900	\$111,100	1.00	100%	1.00	\$111,100	\$111,100	1.00	100%	1.00	\$111,100	\$524,200
Registry/OC Programs Manager	\$99,900	1.00	100%	1.00	\$99,900	\$102,900	1.00	100%	1.00	\$102,900	\$106,000	1.00	100%	1.00	\$106,000	\$109,200	1.00	100%	1.00	\$109,200	\$112,500	1.00	100%	1.00	\$112,500	\$112,500	1.00	100%	1.00	\$112,500	\$530,500
Mentorship Program Manager	\$87,600	1.00	100%	1.00	\$87,600	\$90,200	1.00	100%	1.00	\$90,200	\$92,900	1.00	100%	1.00	\$92,900	\$95,700	1.00	100%	1.00	\$95,700	\$98,600	1.00	100%	1.00	\$98,600	\$98,600	1.00	100%	1.00	\$98,600	\$465,000
Operations Manager (80/20FP)	\$87,600	1.00	100%	1.00	\$87,600	\$90,200	1.00	100%	1.00	\$90,200	\$92,900	1.00	100%	1.00	\$92,900	\$95,700	1.00	100%	1.00	\$95,700	\$98,600	1.00	100%	1.00	\$98,600	\$98,600	1.00	100%	1.00	\$98,600	\$465,000
Recruitment Manager	\$87,600	1.00	100%	1.00	\$87,600	\$90,200	1.00	100%	1.00	\$90,200	\$92,900	1.00	100%	1.00	\$92,900	\$95,700	1.00	100%	1.00	\$95,700	\$98,600	1.00	100%	1.00	\$98,600	\$98,600	1.00	100%	1.00	\$98,600	\$465,000
Human Resources Generalist	\$83,700	1.00	100%	1.00	\$83,700	\$86,200	1.00	100%	1.00	\$86,200	\$88,800	1.00	100%	1.00	\$88,800	\$91,500	1.00	100%	1.00	\$91,500	\$94,200	1.00	100%	1.00	\$94,200	\$94,200	1.00	100%	1.00	\$94,200	\$444,400
On-Call Coordinator #1	\$75,800	1.00	100%	1.00	\$75,800	\$78,100	1.00	100%	1.00	\$78,100	\$80,400	1.00	100%	1.00	\$80,400	\$82,800	1.00	100%	1.00	\$82,800	\$85,300	1.00	100%	1.00	\$85,300	\$85,300	1.00	100%	1.00	\$85,300	\$402,400
On-Call Coordinator #2	\$75,400	1.00	100%	1.00	\$75,400	\$77,700	1.00	100%	1.00	\$77,700	\$80,000	1.00	100%	1.00	\$80,000	\$82,400	1.00	100%	1.00	\$82,400	\$84,900	1.00	100%	1.00	\$84,900	\$84,900	1.00	100%	1.00	\$84,900	\$400,400
Mentorship Services Coordinator 1	\$74,400	1.00	100%	1.00	\$74,400	\$76,600	1.00	100%	1.00	\$76,600	\$78,900	1.00	100%	1.00	\$78,900	\$81,300	1.00	100%	1.00	\$81,300	\$83,700	1.00	100%	1.00	\$83,700	\$83,700	1.00	100%	1.00	\$83,700	\$394,900
Comm Engagement Coord 1	\$74,000	1.00	100%	1.00	\$74,000	\$76,200	1.00	100%	1.00	\$76,200	\$78,500	1.00	100%	1.00	\$78,500	\$80,900	1.00	100%	1.00	\$80,900	\$83,300	1.00	100%	1.00	\$83,300	\$83,300	1.00	100%	1.00	\$83,300	\$392,900
Comm Engagement Coord	\$74,400	1.00	100%	1.00	\$74,400	\$76,600	1.00	100%	1.00	\$76,600	\$78,900	1.00	100%	1.00	\$78,900	\$81,300	1.00	100%	1.00	\$81,300	\$83,700	1.00	100%	1.00	\$83,700	\$83,700	1.00	100%	1.00	\$83,700	\$394,900
Comm Engagement Coord	\$74,700	1.00	100%	1.00	\$74,700	\$76,900	1.00	100%	1.00	\$76,900	\$79,200	1.00	100%	1.00	\$79,200	\$81,600	1.00	100%	1.00	\$81,600	\$84,000	1.00	100%	1.00	\$84,000	\$84,000	1.00	100%	1.00	\$84,000	\$396,400
Accounting Technician	\$92,400	1.00	100%	1.00	\$92,400	\$95,200	1.00	100%	1.00	\$95,200	\$98,100	1.00	100%	1.00	\$98,100	\$101,000	1.00	100%	1.00	\$101,000	\$104,000	1.00	100%	1.00	\$104,000	\$104,000	1.00	100%	1.00	\$104,000	\$490,700
Executive Assistant (80/20GB)	\$70,700	1.00	100%	1.00	\$70,700	\$72,800	1.00	100%	1.00	\$72,800	\$75,000	1.00	100%	1.00	\$75,000	\$77,300	1.00	100%	1.00	\$77,300	\$79,600	1.00	100%	1.00	\$79,600	\$79,600	1.00	100%	1.00	\$79,600	\$375,400
Benefits Coordinator	\$77,600	1.00	100%	1.00	\$77,600	\$79,900	1.00	100%	1.00	\$79,900	\$82,300	1.00	100%	1.00	\$82,300	\$84,800	1.00	100%	1.00	\$84,800	\$87,300	1.00	100%	1.00	\$87,300	\$87,300	1.00	100%	1.00	\$87,300	\$411,900
Registry Specialist 1	\$74,400	1.00	100%	1.00	\$74,400	\$76,600	1.00	100%	1.00	\$76,600	\$78,900	1.00	100%	1.00	\$78,900	\$81,300	1.00	100%	1.00	\$81,300	\$83,700	1.00	100%	1.00	\$83,700	\$83,700	1.00	100%	1.00	\$83,700	\$394,900
Registry Specialist 2	\$74,400	1.00	100%	1.00	\$74,400	\$76,600	1.00	100%	1.00	\$76,600	\$78,900	1.00	100%	1.00	\$78,900	\$81,300	1.00	100%	1.00	\$81,300	\$83,700	1.00	100%	1.00	\$83,700	\$83,700	1.00	100%	1.00	\$83,700	\$394,900
Registry / Counselor - 1	\$70,000	1.00	100%	1.00	\$70,000	\$72,100	1.00	100%	1.00	\$72,100	\$74,300	1.00	100%	1.00	\$74,300	\$76,500	1.00	100%	1.00	\$76,500	\$78,800	1.00	100%	1.00	\$78,800	\$78,800	1.00	100%	1.00	\$78,800	\$371,700
Registry / Counselor - 2	\$69,500	1.00	100%	1.00	\$69,500	\$71,600	1.00	100%	1.00	\$71,600	\$73,700	1.00	100%	1.00	\$73,700	\$75,900	1.00	100%	1.00	\$75,900	\$78,200	1.00	100%	1.00	\$78,200	\$78,200	1.00	100%	1.00	\$78,200	\$368,900
Registry / Counselor - 3	\$69,500	1.00	100%	1.00	\$69,500	\$71,600	1.00	100%	1.00	\$71,600	\$73,700	1.00	100%	1.00	\$73,700	\$75,900	1.00	100%	1.00	\$75,900	\$78,200	1.00	100%	1.00	\$78,200	\$78,200	1.00	100%	1.00	\$78,200	\$368,900
Registry / Counselor - 4	\$69,500	1.00	100%	1.00	\$69,500	\$71,600	1.00	100%	1.00	\$71,600	\$73,700	1.00	100%	1.00	\$73,700	\$75,900	1.00	100%	1.00	\$75,900	\$78,200	1.00	100%	1.00	\$78,200	\$78,200	1.00	100%	1.00	\$78,200	\$368,900
Registry / Counselor - 5	\$70,000	1.00	100%	1.00	\$70,000	\$72,100	1.00	100%	1.00	\$72,100	\$74,300	1.00	100%	1.00	\$74,300	\$76,500	1.00	100%	1.00	\$76,500	\$78,800	1.00	100%	1.00	\$78,800	\$78,800	1.00	100%	1.00	\$78,800	\$371,700
Receptionist / Admin Support (80/20)	\$67,900	1.00	100%	1.00	\$67,900	\$69,900	1.00	100%	1.00	\$69,900	\$72,000	1.00	100%	1.00	\$72,000	\$74,200	1.00	100%	1.00	\$74,200	\$76,400	1.00	100%	1.00	\$76,400	\$76,400	1.00	100%	1.00	\$76,400	\$360,400
Lead LiveScan Technician FP	\$72,500	1.00	100%	1.00	\$72,500	\$74,700	1.00	100%	1.00	\$74,700	\$76,900	1.00	100%	1.00	\$76,900	\$79,200	1.00	100%	1.00	\$79,200	\$81,600	1.00	100%	1.00	\$81,600	\$81,600	1.00	100%	1.00	\$81,600	\$384,900
DOJ/LiveScan Technician #1 FP	\$69,900	1.00	100%	1.00	\$69,900	\$72,000	1.00	100%	1.00	\$72,000	\$74,200	1.00	100%	1.00	\$74,200	\$76,400	1.00	100%	1.00	\$76,400	\$78,700	1.00	100%	1.00	\$78,700	\$78,700	1.00	100%	1.00	\$78,700	\$371,200
DOJ/LiveScan Technician #2 FP	\$69,900	1.00	100%	1.00	\$69,900	\$72,000	1.00	100%	1.00	\$72,000	\$74,200	1.00	100%	1.00	\$74,200	\$76,400	1.00	100%	1.00	\$76,400	\$78,700	1.00	100%	1.00	\$78,700	\$78,700	1.00	100%	1.00	\$78,700	\$371,200
Reserve for Overtime - Program St	\$20,500	1.00	100%	1.00	\$20,500	\$21,100	1.00	100%	1.00	\$21,100	\$21,700	1.00	100%	1.00	\$21,700	\$22,400	1.00	100%	1.00	\$22,400	\$23,100	1.00	100%	1.00	\$23,100	\$23,100	1.00	100%	1.00	\$23,100	\$108,800
HR Manager	\$90,000	1.00	100%	1.00	\$90,000	\$92,700	1.00	100%	1.00	\$92,700	\$95,500	1.00	100%	1.00	\$95,500	\$98,400	1.00	100%	1.00	\$98,400	\$101,400	1.00	100%	1.00	\$101,400	\$101,400	1.00	100%	1.00	\$101,400	\$478,000
Trainer/Provider Specialist	\$74,400	1.00	100%	1.00	\$74,400	\$76,600	1.00	100%	1.00	\$76,600	\$78,900	1.00	100%	1.00	\$78,900	\$81,300	1.00	100%	1.00	\$81,300	\$83,700	1.00	100%	1.00	\$83,700	\$83,700	1.00	100%	1.00	\$83,700	\$394,900
TOTALS	\$2,735,700	32.00	32.00	32.00	\$2,735,700	\$2,817,600	32.00	3200%	32.00	\$2,817,600	\$2,902,100																				

**Operating Expenses Detail**

	7/1/26 - 6/30/27 Original	7/1/27 - 6/30/28 Original	7/1/28 - 6/30/29 Original	7/1/29 - 6/30/30 Original	7/1/30 - 6/30/31 Total	7/1/26 - 6/30/31 Total
<b>Expenditure Category</b>						
Rental of Property	\$530,134	\$465,134	\$465,134	\$465,134	\$465,134	\$2,390,670
Utilities(Elec, Water, Gas, Phone, Garbage)	\$45,000	\$46,350	\$47,741	\$49,173	\$50,648	\$238,912
Office Supplies, Postage	\$55,000	\$56,650	\$58,350	\$60,101	\$61,904	\$292,005
Building Maintenance Supplies and Repair						
Communications, Printing and Reproduction	\$50,000	\$51,500	\$53,045	\$54,636	\$56,275	\$265,456
Insurance	\$41,000	\$42,230	\$43,497	\$44,802	\$46,146	\$217,675
Staff Training	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$250,000
Staff Travel-(Local & Out of Town)	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000	\$25,000
Rental of Equipment						
<b>Consulting/Professional Services</b>						
Consultant A (first \$50k; anything over on next tab)						
Subcontractor A (first \$50k; anything over on next tab)						
Shop Stewards	\$43,827	\$45,142	\$46,496	\$47,891	\$49,328	\$232,684
Independent Financial Auditor	\$31,000	\$32,000	\$33,000	\$34,000	\$35,000	\$165,000
Legal Counsel	\$30,000	\$30,000	\$30,000	\$30,000	\$30,000	\$150,000
IT/Tech Services	\$44,845	\$46,190	\$47,576	\$49,003	\$50,473	\$238,087
SalesForce Software & Consultants	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$250,000
Bookkeeping, HRIS & Payroll Services (Paychex)	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$250,000
Other	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$250,000
<b>Other</b>						
Bank Service, Charges and Fees	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000	\$10,000
Education & Outreach (Incl. SDN)	\$49,250	\$49,250	\$49,250	\$49,250	\$49,250	\$246,250
Exchange (Monthly Email Service - Cloud)	\$4,000	\$4,120	\$4,244	\$4,371	\$4,502	\$21,237
CAPA Annual Dues	\$22,000	\$22,000	\$22,000	\$22,000	\$22,000	\$110,000
Mentorship Program Salaries and Benefits	\$196,537	\$202,433	\$208,506	\$214,761	\$221,204	\$1,043,441
Mentorship Program: Training/Meetings/Materials/Consultants	\$16,480	\$16,974	\$17,483	\$18,007	\$18,547	\$87,491
Governing Body Stipends & Ansilary	\$13,000	\$13,000	\$13,000	\$13,000	\$13,000	\$65,000
Governing Body Communciations and Expenses	\$12,000	\$12,000	\$12,000	\$12,000	\$12,000	\$60,000
CICA Membership	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000	\$25,000
<b>Total Operating Expense</b>	<b>\$1,396,073</b>	<b>\$1,346,973</b>	<b>\$1,363,322</b>	<b>\$1,380,129</b>	<b>\$1,397,411</b>	<b>\$6,883,908</b>

**Subcontractors-Pass Thru**

	7/1/26 - 6/30/27 Original	7/1/27 - 6/30/28 Original	7/1/28 - 6/30/29 Original	7/1/29 - 6/30/30 Original	7/1/30 - 6/30/31 Original	7/1/26 - 6/30/31 Total
<b>Consultant/Subcontractor</b>						
SalesForce Software & Consultants	\$70,000	\$72,100	\$74,000	\$76,220	\$80,007	\$372,327
Bookkeeping, HRIS & Payroll Services (Paychex)	\$12,500	\$13,000	\$13,500	\$13,905	\$15,822	\$68,727
Other	\$40,000	\$30,000	\$30,000	\$30,000	\$30,000	\$160,000
<b>Total Subcontractor</b>	<b>\$122,500</b>	<b>\$115,100</b>	<b>\$117,500</b>	<b>\$120,125</b>	<b>\$125,829</b>	<b>\$601,054</b>
<b>Direct Client Pass-Through</b>						
Direct Client Pass-Through A						
Direct Client Pass-Through B						
IP Transit Passes	\$516,000	\$516,000	\$516,000	\$516,000	\$516,000	\$2,580,000
IP Life Enhancement Fund	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$50,000
IP Supplies & ID Cards / Job Related Safety Equipm	\$36,000	\$36,000	\$36,000	\$36,000	\$36,000	\$180,000
BioMetrics4All & DOJ Per Person Expense	\$172,000	\$172,000	\$172,000	\$172,000	\$172,000	\$860,000
Health Insurance - SF Health Plan	\$131,505,620	\$149,143,521	\$168,323,786	\$188,983,421	\$211,182,910	\$849,139,258
Dental Insurance - Liberty Dental	\$3,064,872	\$3,150,219	\$3,224,079	\$3,301,283	\$3,302,076	\$16,042,529
Subcontracted IP Training	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$500,000
<b>Total Direct Client Pass-Through</b>	<b>\$135,404,492</b>	<b>\$153,127,740</b>	<b>\$172,381,865</b>	<b>\$193,118,704</b>	<b>\$215,318,986</b>	<b>\$869,351,787</b>

*HSA Budget Form (3/24)*

Grantee/Contractor: San Francisco In Home Supportive Services Public Authority  
 Program: Independent Provider Mode

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**Capital Expenses Detail**

	7/1/26 - 6/30/27 Original	7/1/27 - 6/30/28 Original	7/1/28 - 6/30/29 Original	7/1/29 - 6/30/30 Original	7/1/30 - 6/30/31 Original	7/1/26 - 6/30/31 Total
<b>Equipment (any single item \$10k+)</b>						
Copiers		\$11,000			\$11,000	\$22,000
Laptops / Monitors / Telephones			\$11,000	\$11,000		\$22,000
Phone and Internet line purchase/instalation	\$5,000					\$5,000
<b>Remodeling</b>						
Additional Office Cubicles	\$35,000					\$35,000
Remodeling	\$15,000					\$15,000
Lobby, Confrence Rm, & training rm furniture	\$10,000					\$10,000
<b>Total Capital Expenditure (Equipment and Remodeling Cost)</b>	\$65,000	\$11,000	\$11,000	\$11,000	\$11,000	\$109,000

HSA Budget Form (3/24)