



The San Francisco IHSS Public Authority 2008 Annual Report

Letter from the Director

Even more so than in previous years, 2008 saw the Public Authority fighting drastic proposals to cut IHSS and other related services put forth by the Schwarzenegger administration. As part of his annual budget, the Governor proposed, among other items, an 18% cut in “domestic and related services” hours for everyone on IHSS; a 10% cut in state payment to doctors who treat Medi-Cal patients and cuts to many important Optional Medi-Cal Benefits; and ending a state cost-of-living adjustment for Supplemental Security Income/State Supplementary Payment (SSI/SSP) cash assistance grants.

In response, the Public Authority sent out a questionnaire in April to all its IHSS consumers, asking them to let us know how these cuts, if approved, would affect them, their lives and loved ones. By the end of June, nearly 4,700 consumers had written back with their own often quite devastating accounts of the terrible impact these cuts would have on them. Consumers were both outraged by and fearful of the proposed cuts, especially the service hour reduction when so many stated they needed more IHSS hours, not less.

These 4,700 responses have proved a powerful education and advocacy tool. Many of them have been shared with state and local legislators, policymakers and committees, to bring home the very real nature of the suffering these cuts and others would inflict. In addition, different media outlets and organizations have used these stories as the “human interest” element in broader articles about IHSS and the funding problems public authorities are facing statewide.

On the more positive side, 2008 also saw the continued expansion of our On-Call Program and the October launch of our Consumer Peer Mentor Program. In 2008, On-Call Counselors each month fielded on average 480 separate requests for assistance from nearly 100 consumers. Many requests can be quite time-consuming and often require numerous follow-ups/contacts to ensure a consumer is served in a timely way.

The Consumer Peer Mentor Program, spearheaded by Policy & Program Development Director Sergio Alunan, exceeded even our own expectations. By the end of the year, after only three months, 17 mentors had been trained. These mentors, all people who have experience managing their own disabilities successfully, were in the beginning stages of helping 19 mentees make the transition from an institutional setting to community living. Fifteen of the mentees were Laguna Honda Hospital residents who had been identified as candidates for this transition.

Given the current state of the economy and the Governor’s targeting of IHSS for even more cuts down the line, the continued growth and success of programs like On-Call and Consumer Peer Mentor are threatened or may not be able to expand. Nevertheless, the Public Authority remains committed to providing low-income older adults and people with disabilities with the best service possible with the resources available to us.

— Donna Calame

What We Do... We Do For You!

The San Francisco IHSS Public Authority provides six major services:

- ◆ We operate a **Central Registry** that matches independent providers (IP's) of home and personal care services looking for work with IHSS consumers who need to hire someone to assist them.
- ◆ Through our **On-Call Program**, we provide immediate assistance to consumers in urgent need of personal care when their regular provider is not available, they suddenly need a worker but don't yet have one, or when they're discharged from the hospital or some other facility without anyone scheduled to help them make the transition back to their own residence.
- ◆ We are the **"employer of record"** for the IP workforce. This means that we are formally appointed to negotiate wages and benefits with SEIU United Healthcare Workers (UHW), the union that represents our home care workers.
- ◆ We offer benefits for **over 19,000 IP's** through our health and dental plans. Currently, nearly **10,000 IP's** are enrolled in one or both plans. Our Benefits Coordinator, and the assistant who helps her, handle on average over 1,000 calls and requests a month relating to Coverage, Eligibility Status, Enrollment, Insurance Cards, Termination Service, Reinstatement and other services for IP health and dental benefits.
- ◆ We **educate** the community and various policymakers (e.g., Board of Supervisors, state legislators) about IHSS and consumer-directed services and **advocate** for consumers, their workers and related causes.
- ◆ Through our **Consumer Peer Mentor Program**, people who are successfully managing their disabilities share their experiences with and mentor other individuals with disabilities who need support in community living. The program focuses on three major groups: people with disabilities living in institutional settings who are transitioning to more independent community settings; the newly disabled who are adjusting to living with a disability; and consumers who are having difficulty with specific issues, such as home care, transportation/paratransit, housing and self-advocacy.

Outreach & Education:

- ◆ **Worker trainings.** In March 2004, the Public Authority formally launched its Worker Training Program. The program includes a Homecare Skills Development Training and Intensive Homecare Training, for which workers receive a stipend. We also have developed a series of continuing education workshops on topics of interest to our workers.
- ◆ **Periodic conferences, forums and symposiums.** The Public Authority's *Where there's a Will, there's a Way* conferences are free, consumer-oriented events, where older adults and people with disabilities explore and discuss issues relating to home care, including how to hire and train their providers and handle all the paperwork involved in the process. At our last Consumer Open Forum, over two dozen IHSS consumers raised questions about and spoke on issues concerning assessment of hours, income eligibility, training of workers, communication problems and transportation challenges. Our *got RIGHTS?: Fulfilling the Promise of Human and Civil Rights for People with Disabilities* symposium attracted over 200 federal, state and Bay Area policymakers, legislators, IHSS directors, agency representatives, consumer advocates, home care workers, and city and state department officials, who came together to share ideas about how best to fulfill our nation's legal and moral obligations to people with disabilities.
- ◆ **Meetings with policymakers.** The Public Authority's Executive Director, Program Manager and Policy & Program Development Director meet with federal, state and local policymakers and legislators, including the Board of Supervisors, state assemblymembers and senators and representatives from Speaker Pelosi's office, on a regular basis to update them on the agency's work as well as advocate for funding and various reforms and improvements.
- ◆ **Media outreach.** As part of our campaign to familiarize the public with the work of public authorities and their importance, our Executive Director successfully placed an OpEd piece, "Retain services that keep elders and disabled in their homes," in the *Chronicle*. KQED has also aired a piece on in-home supportive services, and New American Media and the *California Progress Report* have featured articles about IHSS and the Public Authority.

Governing Body

The Public Authority Governing Body determines policy and makes legally binding decisions on the Authority's behalf. Its members are both older (55+) and younger consumers, public agency representatives, a worker representative and a union representative. Board members during 2008:

Mike Boyd	Senior Consumer	
Sharon Brunn	Senior Consumer	Treasurer
Rosie Byers	Union Representative	
Luis Calderon	Younger Consumer	
Kelly Dearman	DHS Commissioner	
Jim Illig	DPH Commissioner	Vice President
Tatiana Kostanian	MDC Representative	
Elva Moran	Worker Representative	
Gustavo Serriña	DAAS Commissioner	
Patricia Webb	Younger Consumer	Secretary
Alice Wong	Younger Consumer	President

(Note: Dept. of Aging & Adult Services=DAAS, Dept. of Human Services=DHS, Dept. of Public Health=DPH, Mayor's Disability Council=MDC)

Staff

The Public Authority's executive, administrative, operations and program staff: operate the Central Registry, manage fiscal affairs, monitor state and local policy affecting IHSS, and collaborate with other organizations to improve IHSS for consumers and workers, especially in San Francisco. During 2008 they were:

Sergio Alunan	Policy & Program Development Director
Shelia J. Auzenne	Support Services/On-Call Counselor
Donna Calame	Executive Director
Shirley Chan	Benefits Coordinator
Yvonne Cunningham	On-Call Administrative Coordinator/Program Assistant
Paul Dunn	Training Specialist
Cheryl Durley	Payroll/Operations Coordinator
Vladimir Etalis	Support Services/On-Call Counselor
Claudia Grubler	Support Services Counselor
Patrick Hoctel	Executive Assistant
Xiao Ying Li	Support Services/On-Call Counselor
Laura Molina	Support Services/On-Call Counselor
Manuel Molina	Fiscal & Operations Manager
María A. Olivares	Program Manager
Alex Rodriguez	Receptionist/Benefits & Operations Support
Irina Selskaya	On-Call Program Coordinator/Support Services Counselor
Moon Van	Support Services Counselor

The mission of San Francisco's IHSS Public Authority is to provide and promote a service delivery model of consumer-directed in-home support that maximizes the potential of older adults and people with disabilities to live independently and participate in their communities.

Some Facts About Us

Since its creation by the San Francisco Board of Supervisors in 1995, the In-Home Supportive Services Public Authority has been at the forefront of California's efforts to improve the lives of IHSS consumers and independent providers (IP's), home care workers hired directly by the consumer. The Public Authority continues to meet the challenge of the growing demand for in-home services while contending with variable support for social services in local, state and federal budgets. We now have more providers applying for our Registry than we have openings; the diversity of our Registry workers mirrors the diversity of the consumers who call us seeking assistance. As always, the Authority remains committed to making self-directed personal assistance services a real option for low-income people living independently with disabilities and to ensuring that providing in-home assistance is an attractive work opportunity.

San Francisco IHSS at a Glance

- ◆ In 2008, over 20,600 San Franciscans were served by IHSS, according to December State of California statistics.
- ◆ Over 19,600 consumers (95%) receive services from independent providers (IP's).
- ◆ The number of IP's providing home care services in San Francisco now stands at over 19,200
- ◆ Most consumers (72.5%) are over age 65, and almost two-thirds are women.
Over 6,000 consumers (29.5%) are over age 80.
- ◆ Over 8,700 consumers (42.2%) are people with specific disabilities who require assistance with housekeeping tasks. About one-fifth (19%) have severe impairments and require 20+ hours per week of personal care.
- ◆ The largest ethnic groups served by IHSS are...
 - ◆ Chinese (38.7%)
 - ◆ Caucasian (including Russian speakers) (28%)
 - ◆ African-American (14.5%)
 - ◆ Latino (8.9%)
 - ◆ Other Asian groups (9.8%)
- ◆ The languages most often spoken by consumers are...
 - ◆ Cantonese (32.7%)
 - ◆ English (30.2%)
 - ◆ Russian (17.3%)
 - ◆ Spanish (6.4%)
 - ◆ Mandarin (and other Chinese languages) (5.1%)
 - ◆ Other (8.2%)
- ◆ The average age of Public Authority Registry workers is 51; 88% of our Registry workers are women. Almost a fifth (19.5%) of our workers are African-American; 31.2% are Asian/Pacific Islanders; 10.4% are Caucasian; 32.3% are Latino; and 6.5% are Other or Unknown.
- ◆ The IHSS Public Authority newsletter, *Vision and Voice*, now reaches over 40,000 consumers, workers, politicians, agencies and commissions. It was published twice in 2008, in April and October.

Registry Service Statistics

Our Registry's seven Support Services Counselors field a wide variety of calls and requests, not only from current IHSS consumers and IP's, but from others who—for example—need information on IHSS or want to be on our Registry. Following are 2008 average monthly totals:

Information & Referral	725
Intake (Consumer)	136
Consumer/Worker Lists (Matches)	255
C/W Interview Assistance	137
Consumer Education/Support	91
Administrative Follow-Up	585
Intake (Provider)	135
Worker Support	728
Worker Orientation Participants	24
Worker Training Participants	17
On-Call Requests	480
TOTAL	3,313

In addition to these contacts, Registry staff sent out 2,262 IP referral lists in 2008 from which consumers could hire a worker of their choice. These lists contain the names of eight or more possible IP's matched to their needs. Of the lists, 612 (27%) went to new consumers; the other 1,650 (73%) were sent to consumers who had previously used our Registry.

We got feedback from 664 consumers this year that they had hired from our lists. (The actual number is undoubtedly higher, as we do not hear back from all the consumers we serve.) Consumers have noted to staff that they generally prefer IP's who have completed our in-house Worker Training Program, because they are better informed about what to expect.

The demands on our On-Call program have more than doubled in the past couple of years. The program provides immediate assistance to consumers in urgent need of personal care when their regular provider is not available, they suddenly need a worker but have not yet hired, or when they're discharged from the hospital or some other facility without anyone lined up to help them make the transition back home. On average, about 90% of monthly On-Call referrals come from Department of Aging and Adult Services staff. On-Call requests can be very complex and often require numerous follow-up contacts to assure adequate services are in place in a timely way. Lining up an IP on short notice is challenging, but our Counselors have developed a reliable pool of On-Call workers who are there to meet this crucial need for IHSS consumers.

Although just a few months old at the end of 2008, the Consumer Peer Mentor Program, under the guidance of Policy & Program Development Director Sergio Alunan, had already proved itself a crucial support, especially for those people with disabilities moving to community settings from institutional ones. The program is particularly important as it fulfills requirements set out in the Chambers settlement (*Mark Chambers, et al. v. City and County of San Francisco*) and helps the City and the Department of Public Health reduce the census at Laguna Honda Hospital.

In Conclusion

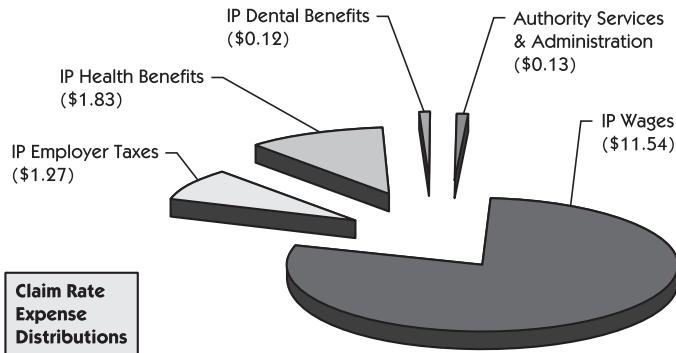
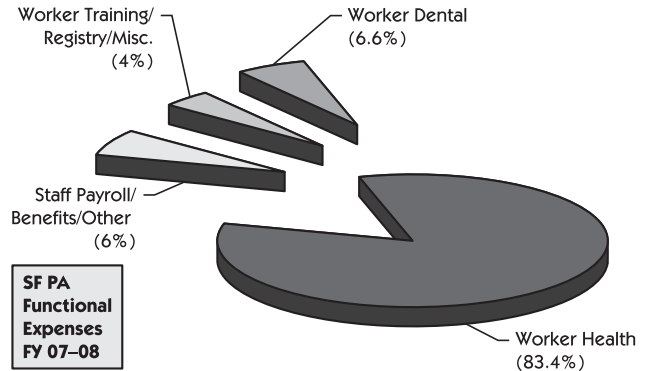
This is a good snapshot of what we do at the San Francisco IHSS Public Authority. If you want to know more, please give us a call or visit our offices sometime.

Program Revenue and Costs for Fiscal Year 2007–08

During Fiscal Year 2007-08, IHSS independent providers (IP's) delivered almost 18.7 million service hours to San Francisco IHSS consumers through the auspices of the Public Authority. In terms of wages, taxes and benefits, the total dollars spent to provide support services to older adults and people with disabilities in the City and County amounted to more than \$299 million dollars. Most of those funds (88%) were used to pay wages and employer payroll taxes for IP's.

Public Authority Expenses

Out of that total amount of \$299 million dollars, the Authority itself received and spent \$36,146,572 (the remaining 12%) in FY 2007-08, with the largest portion \$32,358,105 (90%) going to pay health (\$30,147,308 or 83.4%) and dental (\$2,210,797 or 6.6%) benefits for IHSS workers. The Authority spent \$1,429,832 (4%) for worker trainings, registry services and processing payroll, plus administrative and miscellaneous expenses. The balance of the funds (\$2,358,635 or 6%) was spent for staff payroll, benefits, taxes and expenses. The pie chart to the right shows expense distributions for FY 2007-08.

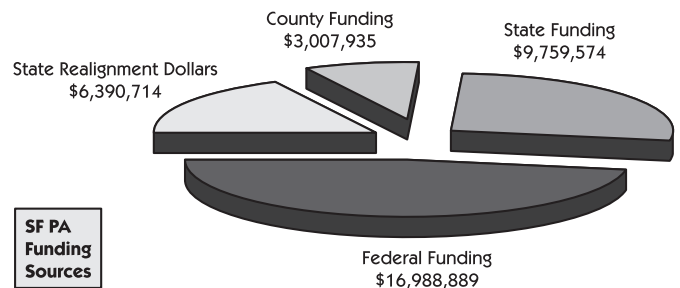


Claim Rate Calculation

Federal and state funding for the Authority is calculated through a state approved Claim Rate, or the amount of money spent for each service hour authorized for consumers in the IP mode. The *average* Claim Rate for FY 2007-08 was \$14.89 per service hour. That Claim Rate consisted of \$11.54 for IP Wages, \$1.83 for IP Health Benefits, \$0.12 for IP Dental Benefits, \$1.27 for IP Employer Taxes and \$0.13 for Authority Services & Administration. The figure to the left shows the Claim Rate breakdown for FY 2007-08.

Public Authority Funding Sources

The Authority receives funding from federal, state and local sources. Federal funds finance approximately 47% of Authority services, and state funds total approximately 27%. The City and County advances the remaining 26%. However, most City and County funding is later reimbursed by state Realignment dollars. The figure to the right shows federal, state and local funding distributions, including Realignment dollars, for FY 2007-08.



F. Vida Jalali Certified Public Accountant

Report of Independent Auditors

To The Board of Directors
San Francisco In-Home Supportive
Services Public Authority
San Francisco, California

We have audited the accompanying Balance Sheet of the San Francisco In-Home Supportive Services Public Authority (the Authority) as of June 30, 2008, and the related Statements of Revenues, Expenses, and Changes in Net Assets, and Cash Flow for the year then ended. These financial statements are the responsibility of the Authority's Management. Our responsibility is to express an opinion on these financial statements based on our audit. The prior year summarized comparative information has been derived from the Authority's June 30, 2007, audited financial statements and in our report dated September 7, 2006, we expressed an unqualified opinion on those financial statements.

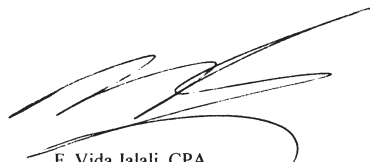
We conducted our audit of these statements in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States, which require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement. An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements, assessing the accounting principles used and significant estimates made by Management, and evaluating the overall financial statement presentation. We believe that our audit provides a reasonable basis for our opinion.

In our opinion, the accompanying Balance Sheet and the related Statements of Revenues, Expenses, and Changes in Net Assets, and of Cash Flow, present fairly, in all material respects, the financial position of the Authority at June 30, 2008, and the results of its operations and its cash flows for the year then ended in conformity with accounting principles generally accepted in the United States of America.

In accordance with Government Auditing Standards, we have also issued our report dated October 8, 2008, on our consideration of the Authority's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with Government Auditing Standards and should be considered in assessing the results of our audit.

Our audit was conducted for the purpose of forming an opinion on the basic financial statements of the Authority taken as a whole. The accompanying Schedule of Expenditures of Federal Awards is presented for purposes of additional analysis as required by the U.S. Office of Management and Budget Circular A-133, Audits of States, Local Governments, and Non-Profit Organizations, and is not a required part of the basic financial statements. Such information has been subjected to the auditing procedures applied in the audit of the basic financial statements and, in our opinion, is fairly stated, in all material respects, in relation to the basic financial statements taken as a whole.

The Management's discussion and analysis on pages 1 and 2 is not a required part of the basic financial statements, but is supplementary information required by the Government Accounting Standards Board. We have applied certain limited procedures which consist principally of inquiries of Management regarding the methods of measurement and presentation of the supplementary information. However, we did not audit the information and do not express an opinion.



F. Vida Jalali, CPA
Alameda, California
October 8, 2008

Contact Us!

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