



# The San Francisco IHSS Public Authority 2006 Annual Report

## Letter from the Director

For the San Francisco IHSS Public Authority, 2006 was a year of change, expansion and progress. On May 1st, we moved from our offices on Market Street to a whole floor and nearly twice the space on Folsom Street near 4th in the Salvation Army Building—a few blocks and a vast change. Among the gains is a large training area with separate classroom for our Worker Training Program. Needless to say, the PA staff has been very pleased with our spacious accommodations complete with views and balconies.

Our Governing Body—we were the first of the public authorities in the state to be formally governed by an independent, consumer majority board—also underwent its own transformation, with many longtime members terming out in March. While we miss their dedication and expertise, the influx of new members has brought new energy and commitment to our work, and with that, new ideas.

One of those board-generated ideas was to convene Consumer Open Forums where IHSS consumers would have an opportunity to socialize, get updated on Public Authority services, and speak on their experiences as older adults and people living with disabilities in San Francisco. In late October, over 20 IHSS consumers attended the first Forum at the Mission Creek Senior Community. They expressed interest in knowing more about the range of Authority services, and spoke openly and forcefully about the challenges, such as reliable transportation, they face in everyday life. Many said they would definitely attend any follow-up Forums and would help to grow the event.

Another historic first this year was a bonus that went out in September to over 15,000 IHSS independent providers (IP's) of home care, thanks to the collaboration of SEIU-UHW and the Authority and support from the City and County of San Francisco. Due to the large number of workers, the average bonus check—slightly over \$50.00—wasn't huge, but the checks were welcomed in any event. The San Francisco IP wage now stands at \$10.65 an hour and is one of the highest in the state. The Authority supports an increase to \$10.95 in early 2007 and to \$11.20 later in the year, if the state increases its share.

The month of September also marked the 5th *Where there's a Will, there's a Way* Conference at St. Mary's Cathedral Conference Center. Hundreds of IHSS consumers and providers attended the event. The morning workshop in Cantonese was filled to overflowing. Nearly 50 agencies—everyone from the Department on the Status of Women to Senior Center Without Walls—participated in the Resource Fair. Richard Devylder, Deputy Director in the State Department of Rehabilitation, gave an inspiring keynote about living with determination and independence as a person born without arms or legs. Mayor Gavin Newsom received our first "Walk the Talk" award for his policy support and funding of Community Living for people with disabilities who need assistance to stay in their own homes and communities.

We have highlighted the new initiatives and activities for 2006. But through the year, we have also served many more people with our On-Call service, especially in partnership with the San Francisco Senior Center's Homecoming Project, and expanded our in-house Worker Training Program. The IHSS caseload continues at a high rate of growth, and we will request staff expansion to keep pace on our Registry. Also, in my capacity as President of CAPA, the statewide association of public authorities, San Francisco has lent its perspective and leadership to this important organization. Our local focus in 2007 will be on better evaluating the effectiveness of Authority practices and refining programs that improve the lives of the City's IHSS consumers.

— Donna Calame

# What We Do... We Do For You!

## The San Francisco IHSS Public Authority provides four major services:

- ◆ We operate a **Central Registry** that matches independent providers (IP's) of home 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 **educate** the community and various policy-makers (e.g., Board of Supervisors) about IHSS and home care issues in San Francisco and **advocate** for our workers (wages and benefits), consumers and causes.

## In addition to these services, we also sponsor:

- ◆ **Consumer workshops.** In these workshops, IHSS recipients learn how to interview potential providers, what to look for, how to manage their workers and avoid possible problems, and how to handle all the paperwork involved in the process, among other things.
- ◆ **Worker trainings.** In March 2004, the Public Authority formally launched its Worker Training Program. The program includes a Homecare Skills Development Training, Intensive Homecare Training (IHT) and a series of continuing education workshops. Workers receive a stipend for all trainings attended.
- ◆ **Consumer conferences.** One of the Public Authority's most popular programs is its "Where there's a Will, there's a Way" conference. At this free, consumer-oriented event, older adults and people with disabilities learn about and discuss issues relating to home care. Our 5th conference was held at St. Mary's Cathedral Conference Center in September 2006 and attracted hundreds of consumers and providers.
- ◆ **Peer Mentor Program.** This program is geared toward consumers new to IHSS. Mentors are matched with consumers based on age, language and interests. Mentors answer questions and provide support on finding the right IHSS worker, obtaining transportation and medical services, finding accessible housing, etc.

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*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.*

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## 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 and a worker representative. Board members during 2006:

<b>Anita Aaron</b>	DAAS Commissioner	
<b>Vincent Behan</b>	Senior Consumer	
<b>Sharon Brunn</b>	Senior Consumer	<b>Treasurer</b>
<b>Rosie Byers</b>	SEIU-UHW Representative	
<b>Peggy Coster</b>	Younger Consumer	<i>Termed out 3/06</i>
<b>Dr. Ray del Portillo</b>	DAAS Commissioner	<i>Termed out 3/06</i>
<b>Jim Illig</b>	DPH Commissioner	<b>President</b>
<b>Elizabeth Grigsby</b>	MDC Representative	
<b>José Quintana</b>	Worker Representative	
<b>Michael Smith</b>	Younger Consumer	<i>Retired 3/06</i>
<b>Patricia Webb</b>	Younger Consumer	<b>Secretary</b>
<b>Alice Wong</b>	Younger Consumer	<b>Vice President</b>

*Note: Dept. of Aging & Adult Services=DAAS, Dept. of Public Health=DPH, Mayor's Disability Council=MDC, Service Employees International Union-United Healthcare Workers=SEIU-UHW, .*

## 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 San Francisco consumers and providers. The staff during 2006:

<b>Donna Calame</b>	Executive Director
<b>Luis Calderon</b>	Project Coordinator
<b>Shirley Chan</b>	Benefits Coordinator
<b>Rachel Cukierman</b>	Fiscal and Operations Manager
<b>Cheryl Durley</b>	Payroll Coordinator / Administrative Assistant
<b>Paul Dunn</b>	Training Specialist
<b>Claudia Grubler</b>	Support Services Counselor
<b>Patrick Hoctel</b>	Executive Assistant
<b>Peggy Liao</b>	Project Coordinator
<b>Esther Libenstein</b>	Support Services Counselor
<b>Carolina Martinez</b>	Receptionist / Administrative Assistant
<b>Sophie Milton</b>	On Call Coordinator
<b>Amy Mo</b>	Support Services Counselor
<b>Laura Molina</b>	Support Services Counselor
<b>Maria Olivares</b>	Program Manager
<b>Irina Selskaya</b>	Support Services Counselor
<b>Moon Van</b>	Support Services Counselor

# 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 2006, over 17,800 San Franciscans used IHSS (an increase of over 1000 consumers from 2005), according to December State of California statistics.
- ◆ Nearly 16,900 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 14,640.
- ◆ Most consumers (80%) are over age 65, and the majority (70%) are women. *Almost 6,700 consumers (37.5%) are over age 80.*
- ◆ Over 6,700 consumers (37.8%) are people with specific disabilities who require assistance with housekeeping tasks. Almost one-fifth (19.5%) have severe impairments and require 20+ hours per week of personal care.
- ◆ The largest ethnic groups served by IHSS are...
  - ◆ Chinese (36.9%)
  - ◆ Caucasian (which includes Russian) (33.9%)
  - ◆ African-American (15.7%)
  - ◆ Latino (11%)
  - ◆ Other (2.5%)
- ◆ The languages most often spoken by consumers are...
  - ◆ Cantonese (31.03%)
  - ◆ English (31.01%)
  - ◆ Russian (20.2%)
  - ◆ Spanish (6.9%)
  - ◆ Mandarin (and other Chinese languages) (5.1%)
  - ◆ Other (5.8%)
- ◆ The average age of Public Authority Registry workers is 49; 88% of our Registry workers are women.
- ◆ The IHSS Public Authority newsletter, *Vision and Voice*, now reaches nearly 32,000 consumers, workers, politicians, agencies and commissions. It is published twice a year, in April and October.

## Registry Service Statistics

Our Registry's six 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 2006 average monthly totals:

Information & Referral	1,560
Worker Support Services	650
Consumer/Worker Matches	572
Worker Benefits	290
Worker Orientation	243
On-Call Requests	225
Other	239
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<b>TOTAL</b>	<b>3,779</b>

The "Other" category above includes Worker Training Program inquiries and support and problem-solving for both consumers and their IP's.

In addition to these contacts, Registry staff sent out 1,942 IP referral lists in 2006 from which consumers could hire a worker of their choice. These lists contain the names of three or more possible IP's matched to their needs. Of the lists, 550 (28.3%) went to new consumers, about half the annual IHSS caseload expansion. The other 1392 (71.6%) were sent to consumers who had previously used our Registry. We got feedback from 552 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.

One factor in successful hires from our lists is the direct assistance Registry staff often provides to consumers. With consumer approval, our Counselors assist in setting up appointments for interviews and other such support in the hiring process. Also, 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 to do a good job.

The demands on our On-Call program have grown dramatically 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 80% of monthly On-Call referrals come from Department of Aging and Adult Services staff. On-Call requests can be very complex and often require several 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.

## In Conclusion

It's important to note that the Registry Service Statistics above are only part of the full picture of work at the Authority. We have designed and San Francisco supports provision of health and dental benefits to the highest proportion of IHSS IP's in the state. Of the 13,000+ IP's covered by our efforts, over 8,200 now access health benefits. Responding to this group takes a good deal of work. Our Benefits Coordinator, and the Administrative Assistant who helps her, handle on average over 700 calls and requests a month relating to Eligibility Status, Enrollment Materials, Insurance Cards, Termination Service, Reinstatement and other services for IP health and dental benefits. 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.

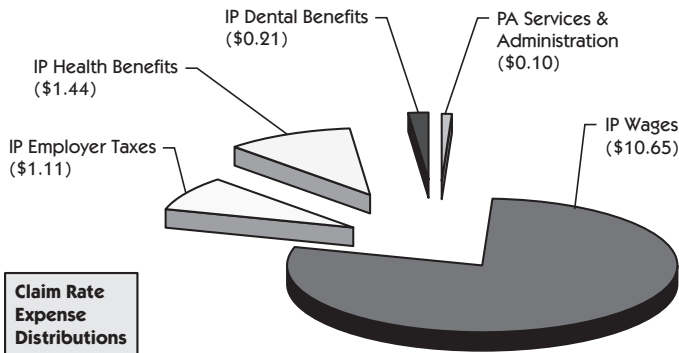
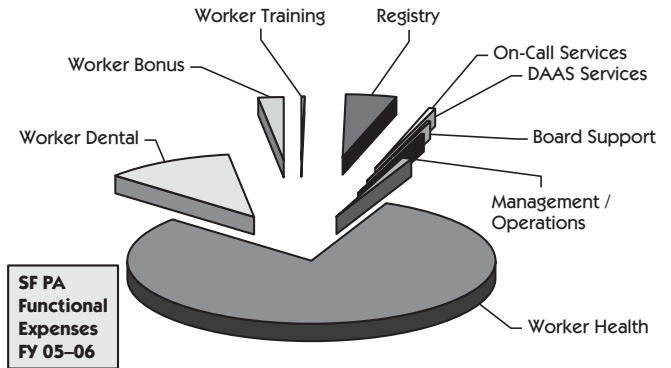
# Program Revenue and Costs for Fiscal Year 2005–06

Through the Authority, IHSS independent providers (IP's) delivered nearly 15.5 million service hours to San Francisco IHSS consumers in FY 2005-06. Over \$205 million dollars were spent to provide these home care service hours to older adults and people with disabilities in San Francisco. Most of those funds (86%) were used to pay wages and employer payroll taxes for IHSS providers.

The Authority received and spent \$27,817,983 (the remaining 14%) in FY 2005-06. The largest portion of these funds (93%) was used to pay for benefits for IHSS workers: \$22,138,964 for health benefits (80% of the total annual expenses), \$3,191,124 for dental benefits (11% of total annual expenses), and \$627,385 for a worker bonus (2% of annual expenses). The next largest expense was \$866,263 for Authority personnel payroll, which constitutes only 3% of total annual expenses.

## Public Authority Expenses

The vast majority of Authority funding was used to pay for IP benefits, including health, dental and a one-time bonus, while the remaining monies supported Worker Training, Registry, On-Call Services, DAAS Services, Board Support, and Public Authority Management and Operations. In FY 2005-06, the Authority experienced two major growth areas: 1) On-Call Services increased by 270%, and 2) the Authority issued a one-time bonus for over 15,000 IP's totaling \$962,738, including taxes and administrative costs. The majority of the funding for the bonus (66%) was received by the Authority in FY 2005-06 (the remaining 34% was received in FY 2006-07). The figure above shows expense distributions for FY 2005-06.

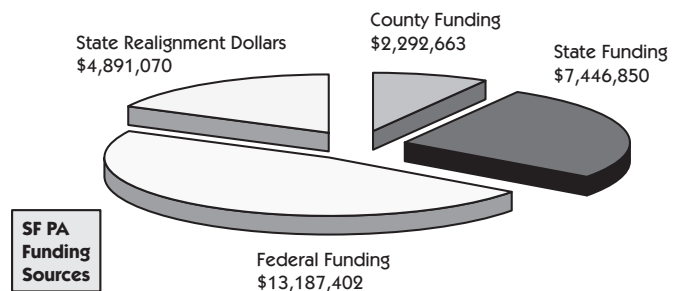


## Claim Rate Calculation

State and federal funding for the Authority is calculated through a state approved Claim Rate, or the amount of money spent for each service hour that a worker provides for a consumer. The *average* Claim Rate for FY 2005-06 was \$13.51 per service hour. Allowable service costs include independent provider wages and benefits, employer taxes and Authority program operations. The Claim Rate Calculation to the left shows IP service hour costs divided by IP Wages, IP Employer Taxes, IP Health and Dental Benefits, and Public Authority Services & Administration.

## 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 2005-06.



# Fiscal Year 2005–06 Audit

*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 San Francisco In-Home Supportive Services Public Authority (the Authority) as of June 30, 2006, and the related statements of revenues, expenses, and changes in net assets, and cash flows 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, 2005 audited financial statements and in our report dated October 28, 2005, we expressed an unqualified opinion on those financial statements.

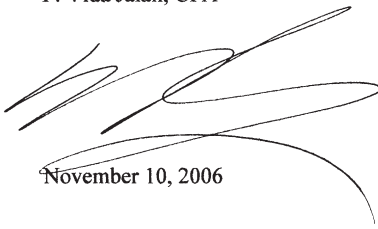
We conducted our audit of these statements in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States, which require that 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 provide 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 flows present fairly, in all material respects, the financial position of the Authority at June 30, 2006, 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 November 10, 2006 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 grants. That report is an integral part of our audit performed in accordance with *Government Auditing Standards* and should be read in conjunction with this report in considering the results of our audits.

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



November 10, 2006

## Contact Us!

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