



The San Francisco IHSS Public Authority 2007 Annual Report

Letter from the Director

The IHSS Public Authority had the opportunity this year to plan and present an educational forum to delve into and share with others the moral and legal concepts that underlie our work to *make real* the promise of human and civil rights for people with disabilities. This July event was inspired in large part by the *U.N. Convention on the Rights of Persons with Disabilities* and the growing global movement to recognize that disability is inherently part of human experience.

A number of national and state leaders on disability rights helped us convey that perspective at our forum: *got RIGHTS? Fulfilling the Promise of Human and Civil Rights for People with Disabilities*. Legal decisions that set forth the right for everyone, not just the temporarily-abled, to live and be educated and work and socialize in the most integrated settings are empty if the needed assistance to do those things is not provided for people who have either never had or lost some capacity for self-care. Assisting IHSS consumers to live the most independent lives possible is our main purpose.

Related to our forum, Mayor Gavin Newsom proclaimed July 19th “Got Rights Day” and California Senator Carole Migden sent a Certificate of Recognition honoring the Authority’s work. The *got RIGHTS?* forum 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.

Most gratifying was the positive response, which reflected that we had in fact met our goal for the event:

“*got RIGHTS?* was incredibly interesting because it offered a different framework to think about disability and service provision.”

“The conference also planted the seed that the disability community may be in the best position to move us all forward on the concept of cultural and economic rights.”

The ideas generated at the forum continue to resonate and motivate us at the Public Authority, and we also hope they deepened the understanding of and motivated disability rights work by those who attended.

Focusing on Public Authority services, our On-Call Program has expanded dramatically to meet a crucial need over the past few years, and 2007 saw a marked growth in this service area. During the first six months (January-June), 299 individuals had 1,416 discrete On-Call assignments, an increase of 65 consumers (22%) and 401 assignments (28%) over the previous six-month period. Using the same time comparison, the total number of On-Call hours increased by almost a third (32%) to 4,205 from the previous 2,864 hours.

Statistics from the third quarter (July-September) of 2007 indicate that this growth trend remained strong and consistent. There was a 24% increase in the number of consumers who requested On-Call over the quarter average (174 vs. 133) and a 26% increase in assignments (820 vs. 608), resulting in a 30% increase in total On-Call Hours (2,384 vs. 1,667).

To keep up with the expanding caseload, we have added a new Support Services/On-Call Counselor position to our Central Registry staff. This allows some specialization among our Counselors, two of whom only do intake of consumers who need a regular home care worker and five of whom handle both regular and On-Call requests. In addition, we expanded the receptionist role to include data entry of On-Call reports and the initial processing of forms and applications for Registry workers hoping to become On-Call providers.

We are pleased that our ability to provide immediate home and personal care services has begun to meet a crucial need in the community. We look forward to working cooperatively with other agencies in providing this support to people who are leaving institutional care or whose regular worker is unexpectedly unable to work.

— Donna Calame

What We Do... We Do For You!

The San Francisco IHSS Public Authority provides five 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 offer benefits for well **over 15,000 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 1000 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 policy-makers (e.g., Board of Supervisors) about IHSS and consumer-directed services and **advocate** for consumers, their workers and related causes.

In addition to these services, we also sponsor:

- ◆ **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 explore and discuss issues relating to home care. In workshops, IHSS recipients can learn about how to interview potential providers, how to manage their workers and avoid possible problems, and how to handle all the paperwork involved in the process. Our 5th conference was held at St. Mary's Cathedral Conference Center in September 2006 and attracted hundreds of consumers and providers.
- ◆ **Forums and Symposiums.** In October 2006, we held our first Consumer Open Forum Luncheon for over two dozen IHSS consumers and several of their providers at the Mission Creek Senior Community. Consumers raised questions about and spoke on issues, including assessment of hours, income eligibility, training of workers, communication/language problems and transportation challenges. In July 2007, we sponsored the *got RIGHTS?: Fulfilling the Promise of Human and Civil Rights for People with Disabilities* symposium at the Hilton San Francisco. The 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.

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.

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 2007:

Anita Aaron	DAAS Commissioner	3/2006 – 7/2007
Vincent Behan	Senior Consumer	3/1998 – 3/2007
Mike Boyd	Younger Consumer	
Sharon Brunn	Senior Consumer	Treasurer
Rosie Byers	SEIU-UHW Representative	
Kelly Dearman	DHS Commissioner	
Elizabeth Grigsby	MDC Representative	3/2006 – 11/2007
Elva M. Hernandez	Worker Representative	
Jim Illig	DPH Commissioner	President
José Quintana	Worker Representative	3/2004 – 3/2007
Gustavo Serriñá	DAAS Commissioner	
Patricia Webb	Younger Consumer	Secretary
Alice Wong	Younger Consumer	Vice President

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

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 workers. During 2007 they were:

Shelia J. Auzenne	Support Services/On-Call Counselor
Donna Calame	Executive Director
Luis Calderon	Project Coordinator
Shirley Chan	Benefits Coordinator
Rachel Cukierman	Fiscal & Operations Manager <i>(Left for New Position 9/07)</i>
Yvonne Cunningham	Programs Assistant/Receptionist
Cheryl Durley	Payroll Coordinator/Administrative Assistant
Paul Dunn	Training Specialist
Vladimir Etalis	Support Services/On-Call Counselor
Claudia Grubler	Support Services Counselor
Patrick Hoctel	Executive Assistant
Xiao Ying Li	Support Services/On-Call Counselor
Esther Libenstein	Support Services Counselor <i>(Retired 3/07)</i>
Carolina Martinez	Receptionist/Admin. Asst. <i>(Left for New Position 8/07)</i>
Sophie Milton	On-Call Coordinator <i>(Left for Graduate School 6/07)</i>
Amy Mo	Support Services/On-Call Counselor <i>(3/2001 – 9/2007)</i>
Laura Molina	Support Services/On-Call Counselor
Manuel Molina	Fiscal & Operations Manager
María A. Olivares	Program Manager
Irina Selskaya	Support Services/On-Call Counselor
Moon Van	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 2007, over 20,700 San Franciscans were served by IHSS, according to December State of California statistics.
- ◆ Over 18,760 consumers (91%) receive services from independent providers (IP's).
- ◆ The number of IP's providing home care services in San Francisco now stands at over 15,400.
- ◆ Most consumers (72.3%) are over age 65, and almost two-thirds are women.
Over 7,000 consumers (34.2%) are over age 80.
- ◆ Over 7,150 consumers (34.7%) are people with specific disabilities who require assistance with housekeeping tasks. Over one-fifth (20.2%) have severe impairments and require 20+ hours per week of personal care.
- ◆ The largest ethnic groups served by IHSS are...
 - ◆ Chinese (38%)
 - ◆ Caucasian (including Russian speakers) (29.3%)
 - ◆ African-American (14.4%)
 - ◆ Latino (9%)
 - ◆ Other Asian groups (9.2%)
- ◆ The languages most often spoken by consumers are...
 - ◆ Cantonese (32.4%)
 - ◆ English (30.4%)
 - ◆ Russian (18.5%)
 - ◆ Spanish (6.5%)
 - ◆ Mandarin (and other Chinese languages) (4.8%)
 - ◆ Other (7.4%)
- ◆ The average age of Public Authority Registry workers is 50; 88% of our Registry workers are women. A quarter (25%) of our workers are African-American; 30.3% are Asian/Pacific Islanders; 10.2% are Caucasian; 26.8% are Latino; and 6% are Other or Unknown.
- ◆ The IHSS Public Authority newsletter, *Vision and Voice*, now reaches over 34,000 consumers, workers, politicians, agencies and commissions. It is published twice a year, 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 2007 average monthly totals:

Information & Referral	1,596
Worker Support Services	714
Consumer/Worker Matches	578
Worker Benefits	188 *
Worker Orientation	271
On-Call Requests	250
Other	390
TOTAL	3,987

* The change in responding to worker benefits calls (from 290 in 2006) by our Counselors is due to the fact that our Programs Assistant now handles many of these calls.

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 2,220 IP referral lists in 2007 from which consumers could hire a worker of their choice. These lists contain the names of six or more possible IP's matched to their needs. (This was an increase of 278 lists or 12.5% from 2006.) Of the lists, 568 (26%) went to new consumers; the other 1,652 (74%) were sent to consumers who had previously used our Registry. We got feedback from 615 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

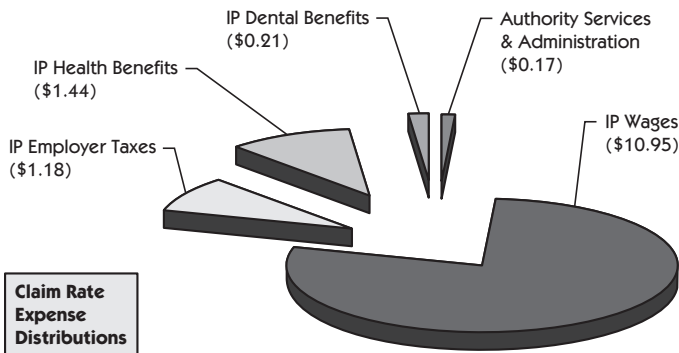
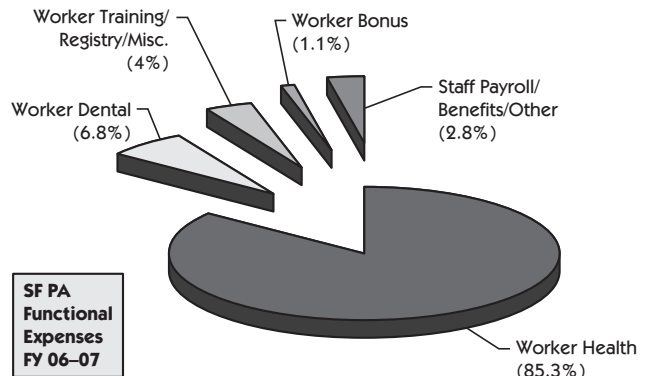
It's important to note that the Registry Service Statistics above are only part of the full picture of work at the Authority. We have designed and San Francisco supports provision of health and dental benefits to the highest proportion of IHSS IP's in the state. Of the 15,000+ IP's covered by our efforts, nearly 10,000 now access health benefits. Responding to this group takes a good deal of work. Our Benefits Coordinator, and the assistant who helps her, handle on average over 1000 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 2006–07

During Fiscal Year 2006-07, IHSS independent providers (IP's) delivered over 16.5 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 home care services to older adults and people with disabilities in the City and County amounted to more than \$233 million dollars. Most of those funds (87.6%) were used to pay wages and employer payroll taxes for IP's.

Public Authority Expenses

The Authority received and spent \$28,817,161 (the remaining 12.4%) in FY 2006-07, with the largest portion (92.1%) going to pay health (\$24,582,515 or 85.3%) and dental (\$1,968,298 or 6.8%) benefits for IHSS workers. The Authority spent \$1,160,282 (almost 4%) for worker trainings, registry services and processing payroll, plus administrative and miscellaneous expenses. A bonus of \$327,330 (1.1%) was paid to IP's; this was the remainder of onetime funds originally distributed in FY 2005-2006. The balance of the funds (\$778,736 or 2.8%) was spent for staff payroll, benefits, taxes and expenses. The pie chart to the right shows expense distributions for FY 2006-07.

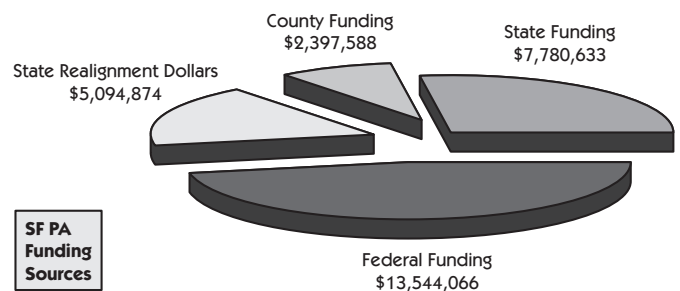


Claim Rate Calculation

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 that a worker provides for a consumer. The *average* Claim Rate for FY 2006-07 was \$13.95 per service hour. That Claim Rate consisted of \$10.95 for IP Wages, \$1.44 for IP Health Benefits, \$0.21 for IP Dental Benefits, \$1.18 for IP Employer Taxes and \$0.17 for Authority Services & Administration. The figure to the left shows the Claim Rate breakdown for FY 2006-07.

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 2006-07.



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, 2007, 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, 2006 audited financial statements and in our report dated November 10, 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 flows present fairly, in all material respects, the financial position of the Authority at June 30, 2007, 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 September 7, 2007, 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 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 are 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
September 7, 2007

Contact Us!

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