



City and County of San Francisco
 London N. Breed, Mayor
 Department of Public Health

Business Office Contract Compliance
 1380 Howard Street
 San Francisco, CA 94103

Programmatic and Fiscal Monitoring Report FY 22-23
Ryan White Funded Services: Part A
HIV Health Services

Agency: Shanti Project

Site Visit Date: December 5, 2023

Program Reviewed: Shanti Emotional and Practical Support
 Services/Psychosocial Support and Client Advocacy
 Program

Report Date: December 7, 2023

Site Address: 730 Polk Street, Third Floor, San Francisco, CA 94109

CID/MOU: 02517 **Funding Source(s):** RWPA

Review Period: Part A: March 1, 2022 - February 28, 2023

On-Site Monitoring Team Member(s): Michelle O'Neal, Andy Scheer, and Maria Lacayo (HHS)

Program/Contractor Representatives: Liz Stumm, Lorena Jimenez, and Shannon Bourne (Personnel)

Overall Program Rating: 4 - Commendable/Exceeds Standards

4 = Commendable/Exceeds Standards	3 = Acceptable/Meets Standards
2 = Improvement Needed/Below Standards	1 = Unacceptable

Category Ratings:

4	Program Performance	3	Program Deliverables	4	Program Compliance	4	Client Satisfaction
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Sub-Categories Reviewed:

Program Performance	Program Deliverables/Fiscal	Program Compliance	Client Satisfaction
Achievement of Performance Objectives	Units of Service Delivered Unduplicated Client Count Delivered	Declaration of Compliance Invoice vs. ARIES Analysis Administrative Binder Site/Premise Compliance Plan of Action (if applicable)	Satisfaction Survey Completed and Analyzed

MONITORING REPORT SUMMARY

Agency/Program: Shanti Project/Shanti Emotional and Practical Support Services/Psychosocial Support and Client Advocac

Findings/Summary: At the time of the site visit, the program did not have a waitlist.

The program met 100.0 percent of its contracted performance objectives.

The program met 69.7 percent of its contracted units of service target.

The program met 99.3 percent of its contracted unduplicated client target.

Client file review evidenced 100.0 percent files in compliance.

The program received 5 points from Declaration of Compliance.

A review of the administrative binder evidenced 100.0 percent of required compliance items.

A review of site premises evidenced 100.0 percent of required items.

The program conducted a client satisfaction process during the review period.

Client satisfaction results were reviewed, analyzed and discussed with program staff.

The Shanti Psychosocial Support and Client Advocacy Program is under the administration of HIV Health Services (HHS).

The program goals are to improve the quality of life of low income medically under- and/or un-insured persons living with HIV in San Francisco. Its sub-populations include: gay, bisexual, heterosexual, and transgender, men, and women; persons of color; newly diagnosed; seniors; persons co-infected with Hepatitis C; undocumented persons; bi/monolingual (Spanish speaking) persons; injection drug users and other substance users; persons with mental health issues; and persons new to San Francisco, recently released from prison or with a criminal justice history.

Service provisions include client advocacy and care navigation, emotional support and practical assistance, support groups and health counseling, a drop-in center, activities and events, and peer support matches that tie volunteers providing emotional support and practical assistance.

BOCC and HHS met with this program in-person and completed this report utilizing a virtual meeting platform as well as telephone and email to gather data. The site visit date reflects the last contact regarding program data.

The program is proud that it was able to hire more bilingual staff and to provide bilingual support groups. The attendees support each other outside of the group and have developed friendships. It is also proud that other providers know about its census.

Previous Year Plan of Action required? **Yes** **No**

If "Yes", describe program's implementation. The program fully implemented its FY 21-22 POA by obtaining a San Francisco Fire Department Fire Clearance.

Current Year Plan of Action required? **Yes** **No**

Signature of Author of This Report

DocuSigned by:

Jerna Reyes

Name and Title: Michelle O'Neal, Business Office Contract Compliance Manager

Signature of Authorizing Departmental Reviewer

DocuSigned by:

Jerna Reyes

Name and Title: Jerna Reyes, BOCC Director

Signature of Authorizing System of Care Reviewer

DocuSigned by:

Bill Blum

Name and Title Bill Blum, HIV Health Services Administrator

PROVIDER RESPONSE: (please check one and sign below)

- I have reviewed the Monitoring Report, acknowledge findings, no further action is necessary at this time.
- I have reviewed the Monitoring Report, acknowledge findings, and attached a Plan of Action in response to deficiencies and recommendations with issues addresses and timelines for correction stated.
- I have reviewed the Monitoring Report, disagree with findings, response to recommendations attached.

DocuSigned by:

Liz Stumm

6/11/24

Signature of Authorized Contract Signatory (Service Provider)

Date

Liz Stumm, HIV Programs Director

Print Name and Title

RESPONSE TO THIS REPORT DUE:	June 3, 2024
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If applicable, please submit any supplemental materials by clicking on the attachment icon below.

Program Performance & Compliance Findings

Rating Criteria:

4	3	2	1
Over 90% = Commendable/ Exceeds Standards	90% - 71% = Acceptable/Meets Standards	70% - 51% = Improvement Needed/ Below Standards	Below 51% = Unacceptable

Overall Score:

Total Points Given: 92/95=97%

1. Program Performance (40 points possible):

Achievement of Performance Objectives	40	15 points out of 15 total points (from 3 Objectives) = 100%
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Total Points:	40
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Points Given:	40/40	Category Score:	100%	Performance Rating:	Commendable/ Exceeds Standards
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Performance Objectives and Findings with Points

O.1	≥ 70% of clients report a decreased level of isolation since being connected with program staff or volunteers.	According to program data, 60 out of 72 (83%) clients reported a decreased level of isolation since being connected with staff or volunteers.	Points: 5
O.2	≥ 60% of clients report an increased level of self sufficiency since being connected with program staff or volunteers.	According to program data, 48 out of 72 (67%) clients reported an increased level of self-sufficiency since being connected with Shanti HIV Services staff or volunteers.	Points: 5
P.1	≥ 80% of new clients seeking practical and/or emotional support are matched to staff or a volunteer ≤ 5 business days.	According to program data, it matched 38 out of 41 (93%) clients to staff or a volunteer within 5 business days.	Points: 5

Commendations/Comments:

The program is commended for achieving all performance objectives.

Identified Problems, Recommendations and Timelines:

None identified.

2. Program Deliverables (20 points possible):

A. Units of Service Deliverables (0-10 pts):		7	70% of Contracted Units of Service.		
B. Unduplicated Client Count (0-10 pts):		10	99% of Target		
Total Points:		17			
Points Given:	17/20	Category Score:	85%	Performance Rating:	Acceptable/ Meets Standards

A. Units of Service Delivered

Units of Service Delivered
Service Description

Contracted/Actual

Service Description	Contracted	Actual
EPS-Care Navigation, Client Advocacy, Psychosocial:385322081FEB23	3,125	3,063
EPS-Emotional/Practical Support Volunteer Hours: 385322081FEB23	4,324	1,942
EPS-Staff Hours with Volunteers:385322081FEB23	1,075	1,251
LTS-Care Navigation, Client Advocacy Psychosocial:385323083AJUN23	892	847
LTS-Emotional/Practical Support Volunteer Hours:385323083AJUN23	2,024	851
LTS-Staff Hours with Volunteers:385323083AJUN23	633	455

B. Unduplicated Client Count

Actual UDC: 273 /**Targeted UDC:** 275 = 99%

Commendations/Comments:

The reported units of service (UOS) are for two types of services provided:

- 1. Emotional and Practical Support program (EPS):** invoice #385322081FEB23.
- 2. Psychosocial Support Services for People Living with HIV/Long-Term Survivors of HIV program (LTS):** invoice # 385323083AJUN23. The LTS services were the result of advocacy for the LTS community to receive mental health support. Staff and volunteers provided psychosocial support to the LTS community.

The program achieved 69.7% of the contracted UOS according to the final invoices.

Identified Problems, Recommendations and Timelines:

According to the program report, it did not meet its LTS Volunteer hours because many volunteers moved away or are no longer able to volunteer. HIV Services staff are currently working to re-engage clients and volunteers now that all services have resumed in-person.

BOCC gathered the EPS UDC identified in this report from program data. BOCC did not use the final invoice to capture the unduplicated client (UDC) count for EPS or LTS because the UDC on its final invoice# 385322081FEB23 did not match program data. The LTS UDC on invoice #385323083AJUN23 is reportedly incorrect due to the overlap of services. According to the program, clients can be billed to both funding sources.

According to the program, it worked with DPH to correct this UDC calculation discrepancy that was discovered on its invoices. The issue has been resolved and will not be an issue for FY 23-24.

3. Program Compliance (25 points possible):

A. Declaration of Compliance Score (0-5 pts):	5	Submitted Declaration
B. Client files documentation (0-10 pts):	5	100% compliance achieved.
C. Administrative Binder Complete (0-5 pts):	5	100% of items in compliance
D. Site/Premises Compliance (0-5 pts):	5	100% items in compliance
E. Plan of Action (if applicable) (5 pts):	5	<input type="checkbox"/> No previous FY POA was required <input checked="" type="checkbox"/> Previous FY POA was submitted, accepted and implemented <input type="checkbox"/> Previous FY POA submitted, not implemented <input type="checkbox"/> Previous YR POA required, not submitted
Total Points:	25	

Points Given:	25/25	Category Score:	100%	Compliance Rating:	Commendable/ Exceeds Standards
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Commendations/Comments:

The program shares the same binder with all of Shanti's HHS programs and is commended for meeting 100% of all compliance requirements.

Identified Problems, Recommendations and Timelines:

None identified.

4. Client Satisfaction (10 points possible): Client Satisfaction Survey

A. Client Satisfaction Completed During Year (0-5 possible)	5
B. Client Satisfaction Survey Results Reviewed, Analyzed and Discussed with Staff (0-5 possible)	5
Total Points:	10

Points Given:	10/10	Category Score:	100%	Client Satisfaction Rating:	Commendable/ Exceeds Standards
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Commendations/Comments:

The results of its client satisfaction surveys are for three of Shanti's HHS programs:

- Emotional and Practical Support Services / Psychosocial Support and Client Advocacy Program
- Emotional and Practical Support Services / Senior Survivor Support Program
- Integrated Medical Case Management

The program obtained 72 completed surveys. It indicated that it hired a consultant to conduct the survey to get more meaningful information. The responses were reported as strongly agree, agree, neutral, disagree, and strongly disagree. Listed below are some of the strongly agree and agree responses:

- I have gained a better understanding of issues related to my health: 75% (43.1% and 31.9%)
- I have been able to make my own decisions about my health or care with support from staff when needed: 75% (44.4% and 30.6%)
- The services that I receive at Shanti have helped me to reduce stress in my day-to-day life: 86.1% (45.8% and 40.3%)
- The services that I receive at Shanti have helped me feel less socially isolated: 83.3% (45.8% and 37.5%)
- The services that I receive at Shanti make me feel like I'm part of a community: 80.6% (43.1% and 37.5%).

Identified Problems, Recommendations and Timelines:

BOCC recommends that program obtain specific client satisfaction information about each program listed above.