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 SACRAMENTO HOUSING AUTHORITY  
 CITY OF SACRAMENTO



*Agency Rpt*  
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**SACRAMENTO HOUSING AND REDEVELOPMENT AGENCY**

**MAY 27 1983**  
 MAY 15, 1983

CITY MANAGER'S OFFICE  
**RECEIVED**  
 MAY 18 1983

Housing Authority of the  
 City of Sacramento

Honorable Members in Session:

**SUBJECT:** Summary of Sacramento Foster Grandparent Program  
 Monitoring Visit Conducted by ACTION Staff

SUMMARY

Attached as Exhibit A is a copy of the ACTION monitor report on the Sacramento Foster Grandparent Program.

BACKGROUND

On November 30 - December 1, 1982, an on-site monitoring visit of the Sacramento Foster Grandparent Program was conducted by Mr. Peter Heinaru, ACTION State Program Specialist.

The project was found to be well organized with a high degree of satisfaction noted by both Foster Grandparents serving in the program and community host agencies receiving Foster Grandparent services. The report notes that the project staff has an excellent sense of the overall program as well as the particulars of project activities.

A review of the project's internal recordkeeping system found the reporting and recording procedures to be thorough, complete and comprehensive. The entire system of monthly reports, recordkeeping at the project office, voucher preparation and documentation is very good.

The report notes three areas which call for further development and clarification:

1. A small number of volunteer folders did not contain a designated beneficiary form and/or assignment form. A review of each folder by project staff has since been undertaken and all forms are now in place.
2. A copy of the monitoring report has been shared with the Director of Finance, SHRA, to review ACTION's comments on the completion of Financial Status Reports.

5-24-83  
 All Districts

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# SACRAMENTO HOUSING AND REDEVELOPMENT AGENCY

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3. A sign-in roster of volunteers attending orientation and in-service training programs has always been maintained by the project although the reviewer did not ask for nor view the file. Future rosters will also note topics on the agenda as well as presenters.

## FINANCIAL DATA

There is no financial implication to the monitoring report.

## POLICY IMPLICATIONS

The actions proposed in this staff report are consistent with previously approved policy and there are no policy changes being recommended.

## RECOMMENDATION

The staff recommends the receipt and filing of this report.

Respectfully submitted,

*William H. Edgar*

William H. Edgar  
Executive Director

TRANSMITTAL TO COUNCIL:

*Walter Slipe*  
For: Walter Slipe  
City Manager



# ACTION

Region IX  
211 Main Street, 5th Floor  
San Francisco, California 94105

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March 21, 1983

Natalie D'Agostini  
Chief, Community Services  
Sacramento Housing Authority  
630 "I" Street  
Sacramento, CA 95814

RE: FGP Grant #439-9018/9

Dear Natalie:

On November 30 - December 1, I conducted a site visit to monitor the progress of the Foster Grandparent Program as viewed by the administrators and participants. Roger Schwarzin and his staff were very cooperative in providing information and arranging for interviews of volunteers, volunteer station staff, and an Advisory Council member. A summary of the review by project areas is presented for your consideration.

## PROJECT EXTERNAL REPORT

### A. Project Staff

Roger and his staff are obviously well organized and dedicated to the project's purpose and goals. During the course of the monitoring visit, it was apparent that they have an excellent sense of the overall program as well as the particulars of project activities.

### B. Advisory Council

I met with Brenda Smith, member of the Council who was well informed and articulate about FGP and the Council's involvement. The Advisory Council activities seem appropriate with subcommittees for evaluation, finances, and recognition. Please note that the new proposed FGP and SCP regulations would require separate advisory councils for each project unless a waiver is granted.

### C. Volunteer Stations

I visited the Cowell Center and the Thomas Jefferson School and interviewed the staff people responsible for supervising the Foster Grandparents. Both sites are very pleased to be

a part of FGP, spoke highly of the volunteers, and were aware of project policies.

D. Volunteers

The volunteers from Cowell Center and the Thomas Jefferson School were very capable and interested in their activities. The service schedules, direct benefits, and awareness of the overall project were all appropriate. The volunteer at the school seems to focus mostly on one child and could have a more distinctive assignment as to who his other child would be.

E. Sponsor Representative

The Chief of Community Services is very informed of the FGP project since she is the former project director and continues to be involved and very supportive.

PROJECT INTERNAL REPORT

A. Active Volunteers

I was able to verify the records for each of the active volunteers. There is an individual folder for each volunteer and the volunteer record book has a section for each person.

B. Volunteer Hours

The hours of service provided by volunteers were verified by the monthly reports submitted and the Financial Status Reports. The system used is thorough in its tracking of each Grandparent.

C. Volunteer Enrollment

Every volunteer folder was examined for completeness and evidence of direct benefits and reviews. The folders were in good order with the only deficiencies being that a few designation of beneficiary forms were missing and several volunteer monthly assignment forms were not complete as to client needs and Foster Grandparent activities.

D. Volunteer Attrition

The attrition as indicated by the previous Project Profile indicates little turnover. Employment and health seem to be the primary reasons for termination.

E. Volunteer Stations

Each volunteer station folder was reviewed and found to be comprehensive. All Memorandums of Understanding were current and complete with only Sutter Hospital still needing to return their updated MU. It was also discussed with Roger that volunteer assignments should be phased-out from the day care centers. It also is preferred that more than one volunteer be placed at a station in order to increase socialization.

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F. Accounting Records

The entire system of monthly reports, recordkeeping at the project office, voucher preparation and documentation is very good. The Financial Status Reports (FSR) are, however, sometimes confusing with items like "investment income reversed". I suggest the appropriate accounting staff read ACTION's "Grants Management Handbook for Grantees", No. 2650.2 for instruction concerning FSR procedures.

G. Volunteer Meals and Transportation

Volunteer costs for these are recorded on the attendance forms and include entries for each day. The format is clear and the method for processing seems efficient.

H. Other Records

There is not a system for each orientation and in-service training. A generic schedule is used. Even though some of the topics discussed are the same, a written record should be maintained as to date, number of volunteers, agenda of activities, and presenters.

This project is administered well with good internal records, cooperative budget preparation, and satisfied volunteers and stations. Please review the above report and indicate the timetable and person responsible for resolving the following items:

- 1) Each volunteer folder to contain designation of beneficiary and monthly assignment forms.
- 2) Financial Status Reports to be completed accurately per ACTION Handbook 2650.2 and conditions of the NGA.
- 3) Future orientation and in-service training programs should be recorded in writing.

A complete response to this report should be received by this office by April 21. I apologize for the delay in sending this report to you.

Thank you very much for your excellent support.

Sincerely,



Peter Heinaru  
State Program Specialist  
Northern California

cc Roger Schwarzin, FGP Director  
Leigh Colitre, ACTION State Director