City and County of San Francisco



Edwin M. Lee, Mayor

Human Services Agency

Department of Human Services Department of Aging and Adult Services

Trent Rhorer, Executive Director

MEMORANDUM

TO:	AGING & A	AGING & ADULT SERVICES COMMISSION								
THROUGH:	SHIREEN M	SHIREEN MCSPADDEN, EXECUTIVE DIRECTOR								
FROM:		CINDY KAUFFMAN, DEPUTY DIRECTOR JOHN TSUTAKAWA, DIRECTOR OF CONTRACTS								
DATE:	JUNE 7, 201	7								
SUBJECT:	THE PROV	GRANT RENEWAL: VARIOUS AGENCIES (NON-PROFIT) FOR THE PROVISION OF THE RESIDENTIAL ASSISTANCE DEMONSTRATION (RAD) PROGRAM								
GRANT TERM:	<u>Current</u> 11/1/15- 6/30/17	<u>Renewal</u> 7/1/17- 6/30/19	<u>Contingency</u>	<u>Total</u>						
GRANT AMOUNT:	\$2,098,095	\$3,238,348	\$323,831	\$3,562,179						
FUNDING SOURCE	<u>County</u>	<u>State</u>	Federal	<u>Contingency</u>	<u>Total</u>					
FUNDING: PERCENTAGE:	\$3,238,348 100%	\$0	\$0	\$323,831	\$3,562,179 100%					

The Department of Aging & Adult Services (DAAS) requests authorization to renew grants with the proposed grantees listed below for the period of July 1, 2017 to June 30, 2019 in an amount of \$3,328,348 plus a 10% contingency for a total amount not to exceed \$3,562,179 (please see attached table). The purpose of the grants is to provide service connection to seniors residing in San Francisco Assistance Demonstration (RAD) converted Housing Development units.

Background

San Francisco Housing Authority (SFHA) has faced significant financial challenges in recent years due to the reduction of federal funding for public housing. Although some public housing properties are well maintained and in good condition, a large number suffer from deferred maintenance and all require extensive capital improvements, as evidenced by high vacancy rates, lengthy and expensive unit turnover, and outstanding maintenance requests. In response to the SFHA's challenges, City and SFHA staff and 72 different organizations met over a 4 month period in early 2013 to re-envision the work of the SFHA. As part of the implementation of those recommendations, SFHA and City staff, including the Mayor's Office, the Mayor's Office of Housing and Community Development, and the City Administrator, developed a financing strategy to address the long term viability of the SFHA portfolio. The proposed financing addressed the critical immediate and long term rehabilitation needs by attracting new capital such as low income housing tax credit equity to replace reduced and inadequate federal funding. The plan also included the use of US Department of Housing and Urban Development (HUD) Project-Based Vouchers under the federal Rental Assistance Demonstration Program (RAD), and additional vouchers which are being requested under HUD's Section 18 Disposition program. These vouchers will preserve the existing affordability of the newly rehabilitated housing.

One of the key elements of the plan is the conversion of federal public housing operating and capital subsidy streams into long-term project-based Section 8 vouchers (PBVs) under the RAD program, to secure the leveraging of private resources.

The SFHA has divided twenty (20) of its public housing sites grouped into eight (8) neighborhood Clusters in San Francisco. Sites range in size from 24 units to 234 units, while the Clusters themselves range in size from 273 units to 577 units. The Clusters have been developed based on the geographic location of the sites and on the type of households residing at each site (i.e. seniors, disabled individuals, or family households), in order to facilitate linkages with neighborhood-based services.

Services to be Provided

Grantees will provide the following core activities under the listed service areas:

1) Outreach and Community Engagement

• Grantees will develop and maintain channels of communications with tenants through newsletters, tenant meetings, monthly activity calendars, community building activities, and educational programs to foster positive relationships with tenants and enhance community living.

2) Health and Wellness

- Grantees will work to build relationships with neighborhood groups, city agencies, and community-based services providers to develop referral partnerships and onsite programming.
- Grantees will assist tenants towards identified needs and goals, offering needs assessments, information and referral, crisis intervention and counseling, and short-term case management while also working to connect tenants with outside service providers and community services.

3) Housing Stability

• Grantees will provide information and direct outreach to tenants to help them maintain their housing and ensure their specific needs are met. Grantees will assist tenants in

addressing and planning for matters related to housing, delinquent rent payments, safety concerns, remedy of incidences and/or lease violations, conflict resolutions, and communication with property management among other areas.

For more specific information regarding the services to be provided at each senior housing site, please refer to the attached Appendices A.

Grantee Performance

• Fiscal Monitoring

All twenty services providers were fiscally monitored for fiscal year 2017-18. The Human Services Agency did not find any significant findings during its annual fiscal monitoring.

• Program Monitoring

All service providers were monitored during the months of March and April of 2017 with no significant findings. All providers are in compliance.

Grantee Selection

Contractors were selected through Request for Qualifications, which was competitively bid by the Mayor's Office of Housing and the Mayor's Office of Housing and Community Development in February 2014

Funding

Funding for these grants is provided by the City and County General Fund.

Attachments

Table of Rental Assistance Demonstration Programs

Bridge Housing Corporation

Appendix A-1 – Services to be Provided – 3850 18th Street Appendix B-1 – Program Budget – 3850 18th Street

Appendix A-2 – Services to be Provided – 462 Duboce Ave Appendix B-2 – Program Budget – 462 Duboce Ave

Appendix A-3 – Services to be Provided – Mission Dolores Appendix B-3 – Program Budget – Mission Dolores

Appendix A-4 – Services to be Provided – 25 Sanchez Street Appendix B-4 – Program Budget – 25 Sanchez Street

Appendix A-5 – Services to be Provided – 255 Woodside Ave Appendix B-5 – Program Budget – 255 Woodside Ave **Chinatown Community Development Center** Appendix A-1 – Services to be Provided – 227 Bay Street Appendix B-2 – Program Budget – 227 Bay Street Appendix A-2 – Services to be Provided – 990 Pacific Ave Appendix B-2 – Program Budget – 990 Pacific Ave

Community Housing Partnership

Appendix A-1 – Services to be Provided – 1750 McAllister Street Appendix B-1 – Program Budget – 1750 McAllister Street

Appendix A-2 – Services to be Provided – 666 Ellis Street Appendix B-2 – Program Budget – 666 Ellis Street

Glide Community Housing

Appendix A – Services to be Provided – 350 Ellis Street Appendix B – Program Budget – 350 Ellis Street

Mercy Housing

Appendix A-1 – Services to be Provided – 345 Arguello Blvd Appendix B -1– Program Budget – 345 Arguello Blvd

Appendix A-2 – Services to be Provided – 491 31st Ave Appendix B-2 – Program Budget – 491 31st Ave

Appendix A-3 – Services to be Provided – 1880 Pine Street Appendix B-3 – Program Budget – 1880 Pine Street

Appendix A-4 – Services to be Provided – 1760 Bush Street Appendix B-4 – Program Budget – 1760 Bush Street

Appendix A-5 – Services to be Provided – JFK Towers Appendix B-5 – Program Budget – JFK Towers

Appendix A-6 – Services to be Provided – 2698 California Street Appendix B-6 – Program Budget – 2698 California Street

Tenderloin Neighborhood Development Corporation

Appendix A-1 – Services to be Provided – 939-51 Eddy Street Appendix B-1– Program Budget – 939-51 Eddy Street

Appendix A-2 – Services to be Provided – 430 Turk Street Appendix B-2 – Program Budget – 430 Turk Street

Appendix A-3 – Services to be Provided – 1251 Turk Street Appendix B-3 – Program Budget – 1251 Turk Street

Appendix A-4 – Services to be Provided – 320-330 Clementina Street Appendix B-4 – Program Budget – 320-330 Clementina Street

Grantee	Site	7/1/17 – 6/30/18	Contract Amount	Contingency	Total Amount
Bridge Housing Corporation	3850 18 th Street	\$92,656	\$185,312	\$18,531	\$203,843
Bridge Housing Corporation	462 Duboce Ave	\$47,687	\$95,374	\$9,537	\$104,911
Bridge Housing Corporation	Mission Dolores (1855 15 th Street)	\$64,421	\$128,842	\$12,884	\$141,726
Bridge Housing Corporation	25 Sanchez Street	\$63,921	\$127,842	\$12,784	\$140,626
Bridge Housing Corporation	255 Woodside Ave	\$93,406	\$186,812	\$18,681	\$205,493
Chinatown Community Development Center	227 Bay Street	\$49,937	\$99,874	\$9,987	\$109,861
Chinatown Community Development Center	990 Pacific Ave	\$137,374	\$274,748	\$27,475	\$302,223
Community Housing Partnership	1750 McAllister Street	\$65,671	\$131,342	\$13,134	\$144,476
Community Housing Partnership	666 Ellis Street	\$66,421	\$132,842	\$13,284	\$146,126
GLIDE Community Housing Inc.	350 Ellis Street	\$65,421	\$130,842	\$13,084	\$143,926
Mercy Housing California	1760 Bush Street	\$92,906	\$185,812	\$18,581	\$204,393
Mercy Housing California	1880 Pine Street	\$94,156	\$188,312	\$18,831	\$207,143
Mercy Housing California	2698 California Street	\$47,187	\$94,374	\$9,437	\$103,811
Mercy Housing California	345 Arguello Blvd	\$34,187	\$68,374	\$6,837	\$75,211
Mercy Housing California	491 31 st Ave	\$35,687	\$71,374	\$7,137	\$78,511
Mercy Housing California	JFK Towers (2451 Sacramento Street)	\$65,921	\$131,842	\$13,184	\$145,026

Rental Assistance Demonstration (RAD) Programs

Tenderloin Neighborhood Development Corp	320-330 Clementina Street	\$274,264	\$548,528	\$54,853	\$603,381
Tenderloin Neighborhood Development Corp	430 Turk Street	\$63,671	\$127,342	\$12,734	\$140,076
Tenderloin Neighborhood Development Corp	939-951 Eddy Street	\$31,937	\$63,874	\$6,387	\$70,261
Tenderloin Neighborhood Development Corp	Rosa Parks (1251 Turk Street)	\$132,343	\$264,686	\$26,469	\$291,155
Total		\$1,619,174	\$3,238,348	\$323,831	\$3,562,179

APPENDIX A-1 – SERVICES TO BE PROVIDED BRIDGE HOUSING CORPORATION

RAD Housing Support Services at 3850 18th Street July 1, 2017 through June 30, 2019

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted housing development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that results in substantial functional limitations in one or more major life activity.
Grantee	BRIDGE Housing Corporation
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted housing development units at 3850 18th Street.

IV. Description of Services

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities
 - Build tenant base
 - Develop neighborhood partnerships
- 2) Community Building
 - Facilitate community organizing and host events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase access to information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities
- 3) Service Connection
 - Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will hire, train, and supervise 1.50 FTE (leveraged and/or grant funded) to provide services at 3850 18th Street during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.
- Staff will make efforts to contact all new tenants to invite them to make use of support services and inform them of community activities.
- Staff will make efforts to contact, interact, inform, and invite all tenants to make uses of support services to assist with and address individual needs or issues. These efforts will include a variety of outreach techniques such as written messages in appropriate languages, flyers, brochures, telephone calls, open house events, and emails as available.

Health and Wellness:

- Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.
- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.
- Assist tenants in identifying and accessing community services needed to meet tenant's specific needs or to make progress toward identified goals.

Housing Stability:

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.
- Staff will provide information on various topics that will help tenants maintain their housing; provide assistance in communicating with, responding to, and meeting with property management to help tenants resolve issues related to housing; provide assistance in the remedy of incidences and/or lease violations that could lead to eviction by establishing written plans; and/or provide assistance with conflict resolution for tenants who need to solve problems or resolve conflicts with other tenants.

Community Engagement:

- Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.
- Staff will provide tenants with opportunities to participate in organized gatherings for peer support, social connections, celebrations/commemorations, and other community events held onsite.
- Staff will provide trainings and educational workshops on a variety of topics relating to health, wellness, finance, housing, and other topics.

V. Location and Time of Services

Services will be provided at 3850 18th Street, Monday through Friday, during regular office hours of 9 a.m. to 5 p.m., excluding holidays. On occasion, workshops or events will be provided after hours or on weekends.

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.
- Grantee will communicate and collaborate regularly with DAAS to help provide logistical and operational support to the program and to provide quality services to tenants.
- Grantee will work collaboratively with DAAS to strategize program direction and services provision.
- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
- Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, and provide documentation that tracks demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Grantee will have individual and group service encounters with at least 50% of the tenants per month.
- Grantee will provide to tenants a minimum of one (1) activity or event per week (or 52 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.

• All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel "strongly" or "very strongly" about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: "How strongly do you feel about being connected and involved in the tenant/resident community at [site]? The options should be "Very strongly", "Strongly", "Somewhat", "Not at all".
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will "agree" or "highly agree" that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: "Do you have better access to services that improve your health and wellness?" The options should be "Highly agree", "Agree", "Neutral", "Disagree", "Highly disagree".
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
 - Number and percentage of unduplicated tenants with individual and group service encounters.
 - Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.

- Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "strongly" or "very strongly" when asked about being connected and involved in their tenant/resident community.
- Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "agree" or "highly agree" when asked about having better access to services that improve their health and wellness.
- Number and percentage of households that have maintained or have obtained a stable housing.
- C. Grantee will provide Ad Hoc reports as required by the Department.
- D. For assistance with reporting requirements or submission of reports, contact:

Rocio.Duenas@sfgov.org Contract Manager, Office of Contract Management Human Services Agency

or

Fanny.Lapitan@sfgov.org Program Analyst, Long Term Care Operations Department of Aging and Adult Services

X. Monitoring Activities

- A. <u>Program Monitoring</u>: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.
- B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	В	С	E
1				oendix B-1, Page 1
2			Docum	nent Date: 4/18/2017
3	HUMAN SERVICES AGENCY	CONTRACT BUD	GET SUMMARY	
4		BY PROGRA	M	
5	Contractor's Name		Contract Term:	
6	BRIDGE Housing Corporation		7/1/2017 - 6/30/2019	
7	(Check One) New RenewalX		.,	
	· · · –			
8	If modification, Effective Date of Mod. No. c	of Mod.		
9	Program: Rental Assistance Demonstration - 18	8th Street		
10	Budget Reference Page No.(s)			TOTAL
	Program Term	7/1/17 - 6/30/18	7/1/18 - 6/30/19	7/1/17-6/30/19
12	Human Services Agency Expenditures			
13	Salaries & Benefits	\$0	\$0	\$0
	Operating Expense	\$82,729	\$84,052	\$166,781
	Capital Expenditure	\$0	\$0	\$0
	Subtotal	\$82,729	\$84,052	\$166,781
	Indirect Percentage (%)	12.00%	10.24%	
	Indirect Cost (Line 16 X Line 17)	\$9,927	\$8,604	\$18,531
19	Total HSA Expenditures	\$92,656	\$92,656	\$185,312
20	Developer Match Expenditures			
	Salaries & Benefits	\$0	\$0	\$0
	Operating Expense	\$72,321	\$73,479	\$145,800
	Capital Expenditure	\$0	\$0	\$0
	Subtotal	\$72,321	\$73,479	\$145,800
20	Indirect Percentage (%)	12.00%	10.24%	
	Indirect Cost (Line 16 X Line 17)	\$8,678	\$7,522	\$16,200
27	Total Developer Expenditures	\$80,999	\$81,001	\$162,000
28		A (TA) A C	* (T0 0 T0	A0 (T 0 (0
	Total HSA and Developer Expenditures	\$173,656	\$173,656	\$347,312
30	HSA Revenues	* ***	* •••	* • • = • • •
	Local General Fund	\$92,656	\$92,656	\$185,312
32 33				
34				
35				
36				
37				
38				
39	TOTAL HSA REVENUES	\$92,656	\$92,656	\$185,312
40	Developer Revenues			
41	Developer Match Funds	\$81,000	\$81,000	\$162,000
42				\$0
43				\$0
44 45	Total Developer Revenues	\$81,000	\$81,000	\$0 \$162,000
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46	Total Revenues	\$173,656	\$173,656	\$347,312
47	Full Time Equivalent (FTE)	1.99		
49	Prepared by: Susan Neufeld	Telephone No.: 415-3	21-3526	Date 4/18/17
50	HSA-CO Review Signature:			
51	HSA #1			
52				

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1													B-1, Page 2
2											Document	Date	: 4/18/2017
4	Contractor's Name: B	RIDGE Housi	ng Corpora	tion									
5 6													
6 7				Ope	ratino	Expense	Detai	1					
8				- [,		-					
_						an Services	Hu	uman Services				т	OTAL
9 10	HSA Expenditure Cate	eaorv		TERM		dgency 7 - 6/30/18	7	Agency /1/18 - 6/30/19				7/1/1	7-6/30/19
	Rental of Property	- <u></u>										., ., .	
	Telephone and Office	Furniture											
13	Program/Office Suppli	ies											
14	Utilities (Electricity, W	ater, Sewer, G	as, Phone))	\$	430	\$	430			\$		860
15	Printing and Reproduc	ction											
16	Insurance												
17	Staff Travel (Local & C	Out of Town)			\$	100	\$	100			\$		200
18	Law Library												
19	Membership/Dues												
20	Rental of Equipment												
	Senior Right Bulletin												
22	Staff Training												
	Sub-Contractor (NCP)	HS)		_	\$	81,182	\$	82,505	·		\$		163,687
	OTHER	,		_		,		,	·				
	Language Line			_									
	Pangea/AASC Databa			_	\$	1,017	\$	1,017	. <u> </u>		\$		2,034
28 29	Educational Programs	6		_									
30				_					·				
	TOTAL HSA OPERAT	TING EXPENS	E		\$	82,729	\$	84,052			\$		166,781
32						-,	<u>,</u>	- ,	·				, -
	Developer Match Ope	erating Expens	e										
34	Rental of Property												
35	Telephone and Furnitu	ure											
36	Office Supplies, Posta	age											
	Printing and Reproduc	-							·				
	Insurance												
	Law Library												
	Membership/Dues												
41	Rental of Equipment												
42	Volunteer Expenses (I	Receptionist/ir	ntake)										
43	Client Costs												
44	Educational Programs	6											
45	Charting								. <u> </u>				
46	Staff Training												
47	Sub-Contractor (NCPI	HS)			\$	72,321	\$	73,479			\$		145,800
48													
	TOTAL DEVELOPER	OPERATING	EXPENSE		\$	72,321	\$	73,479			\$		145,800
50 51	TOTAL OPERATING	EXPENSE			\$	155,050	\$	157,531			\$		312,581
52													

APPENDIX A-2 – SERVICES TO BE PROVIDED BRIDGE HOUSING CORPORATION

RAD Housing Support Services at 462 Duboce Avenue July 1, 2017 through June 30, 2019

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that result in substantial functional limitations in one or more major life activity.
Grantee	BRIDGE Housing Corporation
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units at 462 Duboce Avenue.

IV. Description of Services

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities
 - Build tenant base
 - Develop neighborhood partnerships
- 2) Community Building
 - Community organizing and events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities
- 3) Service Connection
 - Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will hire, train, and supervise 1.0 FTE (leveraged and/or grant funded) to provide services at 462 Duboce Avenue during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.
- Staff will make efforts to contact all new tenants to invite them to make use of support services and inform them of community activities.
- Staff will make efforts to contact, interact, inform, and invite all tenants to make uses of support services to assist with and address individual needs or issues. These efforts will include a variety of outreach techniques such as written messages in appropriate languages, flyers, brochures, telephone calls, open house events, and emails as available.

Health and Wellness:

- Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.
- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.
- Staff will assist tenants identify and access community services needed to meet tenant's specific needs or to make progress toward identified goals.

Housing Stability:

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.
- Staff will provide information on various topics that will help tenants maintain their housing; provide assistance in communicating with, responding to, and meeting with property management to help tenants resolve issues related to housing; provide assistance in the remedy of incidences and/or lease violations that could lead to eviction by establishing written plans; and/or provide assistance with conflict resolution for tenants who need to solve problems or resolve conflicts with other tenants.

Community Engagement:

- Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.
- Staff will provide tenants with opportunities to participate in organized gatherings for peer support, social connections, celebrations/commemorations, and other community events held onsite.
- Staff will provide trainings and educational workshops on a variety of topics relating to health, wellness, finance, housing, and other topics.

V. Location and Time of Services

Services will be provided at 462 Duboce Avenue, Monday through Friday during regular office hours of 9 a.m. to 5 p.m., excluding holidays. On occasion, workshops or events will be provided after hours or on weekends. In addition, some events and activities will be offered in the community room at 25 Sanchez to accommodate a larger group size.

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.
- Grantee will communicate and collaborate regularly with DAAS to help provide logistical and operational support to the program and to provide quality services to tenants.
- Grantee will work collaboratively with DAAS to strategize program direction and services provision.
- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
- Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, and provide documentation that tracks demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Grantee will have individual and group service encounters with at least 65% of the tenants per month.
- Grantee will provide to tenants a minimum of two (2) activities or events per week (or 104 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.

• All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel "strongly" or "very strongly" about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: "How strongly do you feel about being connected and involved in the tenant/resident community at [site]? The options should be "Very strongly", "Strongly", "Somewhat", "Not at all".
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will "agree" or "highly agree" that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: "Do you have better access to services that improve your health and wellness?" The options should be "Highly agree", "Agree", "Neutral", "Disagree", "Highly disagree".
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
 - Number and percentage of unduplicated tenants with individual and group service encounters.
 - Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.

- Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "strongly" or "very strongly" when asked about being connected and involved in their tenant/resident community.
- Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "agree" or "highly agree" when asked about having better access to services that improve their health and wellness.
- Number and percentage of households that have maintained or have obtained a stable housing.
- C. Grantee will provide Ad Hoc reports as required by the Department.
- D. For assistance with reporting requirements or submission of reports, contact:

Rocio.Duenas@sfgov.org Contract Manager, Office of Contract Management Human Services Agency

or

Fanny.Lapitan@sfgov.org Program Analyst, Long Term Care Operations Department of Aging and Adult Services

X. Monitoring Activities

- A. <u>Program Monitoring</u>: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.
- B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	В	С	E
1				Appendix B-2, Page 1
2			Do	cument Date: 4/18/2017
3	HUMAN SERVICES AGENCY	CONTRACT BUD	GET SUMMARY	
4		BY PROGRA	M	
5	Contractor's Name		Contract Term:	
6	BRIDGE Housing Corporation		July 1, 2017 - June 3	0, 2019
7	(Check One) New RenewalX	Modification		
8	If modification, Effective Date of Mod. No. o	of Mod.		
	Program: Rental Assistance Demonstration - 46	2 Duboce		
	Budget Reference Page No.(s)			TOTAL
11 12	Program Term Human Services Agency Expenditures	7/1/17 - 6/30/18	7/1/18 - 6/30/19	7/1/17-6/30/19
	Salaries & Benefits	\$0	\$0	0.2
_	Operating Expense	\$43,935	\$0 \$44,677	\$0 \$88,612
	Capital Expenditure	43,933 \$0	\$0 \$0	\$00,012
	Subtotal	\$43,935	\$44,677	\$88,612
	Indirect Percentage (%)	8.54%	· · ·	÷,> · -
. /	Indirect Cost (Line 16 X Line 17)	\$3,752	\$3,010	\$6,762
	Total HSA Expenditures	\$47,687	\$47,687	\$95,374
20	Developer Match Expenditures	÷,	• • • • • • • • • • • • • • • • • • •	+++++++++++++++++++++++++++++++++++++++
	Salaries & Benefits	\$0	\$0	\$0
22	Operating Expense	\$55,970	\$56,915	\$112,885
	Capital Expenditure	\$0	\$0	\$0
	Subtotal	\$55,970	\$56,915	\$112,885
25	Indirect Percentage (%)	8.54%	6.74%	
26	Indirect Cost (Line 16 X Line 17)	\$4,780	\$3,835	\$8,615
27	Total Developer Expenditures	\$60,750	\$60,750	\$121,500
28				
	Total HSA and Developer Expenditures	\$108,437	\$108,437	\$216,874
30	HSA Revenues			
	Local General Fund	\$47,687	\$47,687	\$95,374
32				
33 34				
35				
36				
37				
38				
39	TOTAL HSA REVENUES	\$47,687	\$47,687	\$95,374
40	Developer Revenues			• •
41	Developer Match Funds	\$60,750	\$60,750	\$121,500
42				\$0
43				\$0
44	Total Davalapar Powancias	<u>ФСО 7</u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u>	<u> </u>	\$0 \$121 500
45	Total Developer Revenues	\$60,750	\$60,750	\$121,500
46	Total Revenues	\$108,437	\$108,437	\$216,874
47	Full Time Equivalent (FTE)	1.20		
49	Prepared by: Susan Neufeld	Telephone No.: 415-32	21-3526	Date 4/18/17
50	HSA-CO Review Signature:			
51	HSA #1			
52				
-				

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1	· · · ·									2, Page 2
2								Docu	ment D	ate: 4/18/2017
4	Contractor's Name: BRIDGE Housing Corpora	tion								
5 6										
7		Оре	rating	Expense	De	etail				
8					т 1			т		
9				n Services gency			an Services Agency			TOTAL
10	HSA Expenditure Category	TERM		7 - 6/30/18			8 - 6/30/19	-	7/1	/17-6/30/19
11	Rental of Property							_		
12	Telephone and Office Furniture							_		
13	Program/Office Supplies		\$	1,400		\$	1,400	_	\$	2,800
14	Utilities (Electricity, Water, Sewer, Gas, Phone)		\$	1,800	_	\$	1,800	_	\$	3,600
15	Printing and Reproduction		\$	20	_	\$	20	_	\$	40
16	Insurance				_			_		
17	Staff Travel (Local & Out of Town)		\$	100		\$	100	-	\$	200
	Law Library			-			-	-		
	Membership/Dues							-		
	Rental of Equipment							-		
	Senior Right Bulletin							-		
22								_		
	Staff Training	_	\$	450		\$	450	_	\$	900
	Sub-Contractor (NCPHS)	_	\$	39,365	- •	\$	40,107	-	\$	79,472
	OTHER									
	Language Line Pangea/AASC Database	_	\$	800		\$	800	-	\$	1,600
	Educational Programs	_	•			•		_	•	.,
29		_						-		
30										
	TOTAL HSA OPERATING EXPENSE		\$	43,935	- •	\$	44,677	-	\$	88,612
32										
33	Developer Match Operating Expense									
34	Rental of Property							-		
35	Telephone and Furniture							_		
36	Office Supplies, Postage							-		
37	Printing and Reproduction							-		
38	Insurance							_		
39	Law Library							-		
40	Membership/Dues							_		
41	Rental of Equipment							_		
42	Volunteer Expenses (Receptionist/intake)							_		
43	Client Costs							_		
44	Educational Programs							_		
45	Charting							_		
46	Staff Training							_		
47	Sub-Contractor (NCPHS)		\$	55,970		\$	56,915	_	\$	112,885
48										
	TOTAL DEVELOPER OPERATING EXPENSE		\$	55,970		\$	56,915	_	\$	112,885
	TOTAL OPERATING EXPENSE		\$	99,905		\$	101,592	_	\$	201,497
52 53	HSA #3									

APPENDIX A-3 – SERVICES TO BE PROVIDED BRIDGE HOUSING CORPORATION

RAD Housing Support Services at Mission Dolores (1855 15th Street) July 1, 2017 through June 30, 2019

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that results in substantial functional limitations in one or more major life activity.
Grantee	BRIDGE Housing Corporation
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted housing development units at Mission Dolores (1855 15th Street).

IV. Description of Services

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities
 - Build tenant base
 - Develop neighborhood partnerships
- 2) Community Building
 - Facilitate community organizing and host events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase access to information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities
- 3) Service Connection
 - Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will hire, train, and supervise 1.25 FTE (leveraged and/or grant funded) to provide services at Mission Dolores (1855 15th Street) during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.
- Staff will make efforts to contact all new tenants to invite them to make use of support services and inform them of community activities.
- Staff will make efforts to contact, interact, inform, and invite all tenants to make uses of support services to assist with and address individual needs or issues. These efforts will include a variety of outreach techniques such as written messages in appropriate languages, flyers, brochures, telephone calls, open house events, and emails as available.

Health and Wellness:

- Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.
- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.
- Staff will assist tenants identify and access community services needed to meet tenant's specific needs or to make progress toward identified goals.

Housing Stability:

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.
- Staff will provide information on various topics that will help tenants maintain their housing; provide assistance in communicating with, responding to, and meeting with property management to help tenants resolve issues related to housing; provide assistance in the remedy of incidences and/or lease violations that could lead to eviction by establishing written plans; and/or provide assistance with conflict resolution for tenants who need to solve problems or resolve conflicts with other tenants.

Community Engagement:

- Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.
- Staff will provide tenants with opportunities to participate in organized gatherings for peer support, social connections, celebrations/commemorations, and other community events held onsite.
- Staff will provide trainings and educational workshops on a variety of topics relating to health, wellness, finance, housing, and other topics.

V. Location and Time of Services

Services will be provided at Mission Dolores (1855 15th Street), Monday through Friday, during regular office hours of 9 a.m. to 5 p.m., excluding holidays. On occasion, workshops or events will be provided after hours or on weekends.

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.
- Grantee will communicate and collaborate regularly with DAAS to help provide logistical and operational support to the program and to provide quality services to tenants.
- Grantee will work collaboratively with DAAS to strategize program direction and services provision.
- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
- Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, and provide documentation that tracks demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Grantee will have individual and group service encounters with at least 50% of the tenants per month.
- Grantee will provide to tenants a minimum of one (1) activity or event per week (or 52 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.

• All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel "strongly" or "very strongly" about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: "How strongly do you feel about being connected and involved in the tenant/resident community at [site]? The options should be "Very strongly", "Strongly", "Somewhat", "Not at all".
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will "agree" or "highly agree" that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: "Do you have better access to services that improve your health and wellness?" The options should be "Highly agree", "Agree", "Neutral", "Disagree", "Highly disagree".
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
 - Number and percentage of unduplicated tenants with individual and group service encounters.
 - Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.

- Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "strongly" or "very strongly" when asked about being connected and involved in their tenant/resident community.
- Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "agree" or "highly agree" when asked about having better access to services that improve their health and wellness.
- Number and percentage of households that have maintained or have obtained a stable housing.
- C. Grantee will provide Ad Hoc reports as required by the Department.
- D. For assistance with reporting requirements or submission of reports, contact:

Rocio.Duenas@sfgov.org Contract Manager, Office of Contract Management Human Services Agency

or

Fanny.Lapitan@sfgov.org Program Analyst, Long Term Care Operations Department of Aging and Adult Services

X. Monitoring Activities

- A. <u>Program Monitoring</u>: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.
- B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	В	С	E							
1			Apr	pendix B-3, Page 1							
2			Docur	ment Date:4/18/2017							
3	HUMAN SERVICES AGENCY	CONTRACT BUD	GET SUMMARY								
4	BY PROGRAM										
5	Contractor's Name		Contract Term:								
	BRIDGE Housing Corporation		7/1/2017 - 6/30/2019								
7	(Check One) New Renewal X	Modification	1/1/2011 0/00/2010								
-		of Mod.									
0											
9	Program: Rental Assistance Demonstration - 15	5th Street Mission Dolo	ores								
10	Budget Reference Page No.(s)			TOTAL							
11	Program Term	7/1/17 - 6/30/18	7/1/18 - 6/30/19	7/1/17-6/30/19							
12	Human Services Agency Expenditures										
13	Salaries & Benefits	\$0	\$0	\$0							
	Operating Expense	\$57,519	\$58,565	\$116,084							
	Capital Expenditure	\$0	\$0	\$0							
	Subtotal	\$57,519	\$58,565	\$116,084							
	Indirect Percentage (%)	12.00%	10.00%								
18	Indirect Cost (Line 16 X Line 17)	\$6,902	\$5,856	\$12,759							
19	Total HSA Expenditures	\$64,421	\$64,421	\$128,842							
20	Developer Match Expenditures										
21	Salaries & Benefits	\$0	\$0	\$0							
22	Operating Expense	\$72,321	\$73,636	\$145,958							
23	Capital Expenditure	\$0	\$0	\$0							
	Subtotal	\$72,321	\$73,636	\$145,958							
25	Indirect Percentage (%)	12.00%	10.00%								
26	Indirect Cost (Line 16 X Line 17)	\$8,679	\$7,364	\$16,043							
27	Total Developer Expenditures	\$81,000	\$81,000	\$162,000							
28											
29	Total HSA and Developer Expenditures	\$145,422	\$145,421	\$290,843							
30	HSA Revenues										
31	Local General Fund	\$64,421	\$64,421	\$128,842							
32											
33											
34											
35											
36											
37 38											
		0.4 404	004 404	¢400.040							
39	TOTAL HSA REVENUES	\$64,421	\$64,421	\$128,842							
40	Developer Revenues	A 04.000	MO 4 0000	# 400.000							
41 42	Developer Match Funds	\$81,000	\$81,000	\$162,000							
42				\$0 \$0							
43				\$0 \$0							
44	Total Developer Revenues	\$81,000	\$81,000	\$162,000							
46	Total Revenues	\$145,421	\$145,421	\$290,842							
	Full Time Equivalent (FTE)	1.60	÷, /21	÷===;==12							
		•	Tolonhors Nr.	Data 4/40/47							
	Prepared by:	Susan Neufeld	Telephone No.	Date 4/18/17							
	HSA-CO Review Signature:										
	HSA #1										
52											

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1				B.			A	ppendix B-3, Page 2
2							Docum	nent Date: 4/18/2017
4	Contractor's Name: BRIDGE Housing Corporat	ion						
5 6								
7		Оре	rating	Expense D	Detail			
8		i	Luma	n Services	Live	nan Services		
9				gency	nur	Agency		TOTAL
10	HSA Expenditure Category	TERM	7/1/1	7 - 6/30/18	7/1	/18 - 6/30/19		7/1/17-6/30/19
11	Rental of Property							
12	Telephone and Office Furniture							
13	Program/Office Supplies							
14	Utilities (Electricity, Water, Sewer, Gas, Phone)		\$	300	\$	300	\$	600
15	Printing and Reproduction		\$	20	\$	20	\$	40
16	Insurance							
17	Staff Travel (Local & Out of Town)		\$	100	\$	110	\$	210
	Law Library							
	Membership/Dues							
	Rental of Equipment							
	Senior Right Bulletin							
22								
	Staff Training	_						
	Sub-Contractor (NCPHS)	-	\$	55,499	\$	56,535	\$	112,034
	Language Line Pangea/AASC Database	-	\$	1,600	\$	1,600	\$	3,200
	Educational Programs	_	·	,		,		-,
29		_						
30			•		•			
31	TOTAL HSA OPERATING EXPENSE		\$	57,519	\$	58,565	\$	116,084
32								
	Developer Match Operating Expense							
34	Rental of Property							
	Telephone and Furniture							
36	Office Supplies, Postage							
37	Printing and Reproduction							
38	Insurance							
39	Law Library							
40	Membership/Dues							
41	Rental of Equipment							
42	Volunteer Expenses (Receptionist/intake)							
43	Client Costs							
44	Educational Programs							
45	Charting							
46	Staff Training							
47	Sub-Contractor (NCPHS)		\$	72,321	\$	73,636	\$	145,958
48								
49	TOTAL DEVELOPER OPERATING EXPENSE		\$	72,321	\$	73,636	\$	145,958
50 51	TOTAL OPERATING EXPENSE		\$	129,840	\$	132,201	\$	262,041
52			Ψ	120,040	Ψ	102,201	Ψ	202,041
53	HSA #3							

APPENDIX A-4 – SERVICES TO BE PROVIDED BRIDGE HOUSING CORPORATION

RAD Housing Support Services at 25 Sanchez Street July 1, 2017 through June 30, 2019

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that result in substantial functional limitations in one or more major life activity.
Grantee	BRIDGE Housing Corporation
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units at 25 Sanchez Street.

IV. Description of Services

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities
 - Build tenant base
 - Develop neighborhood partnerships
- 2) Community Building
 - Community organizing and events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities
- 3) Service Connection
 - Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will hire, train, and supervise 1.25 FTE (leveraged and/or grant funded) to provide services at 25 Sanchez Street during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.
- Staff will make efforts to contact all new tenants to invite them to make use of support services and inform them of community activities.
- Staff will make efforts to contact, interact, inform, and invite all tenants to make uses of support services to assist with and address individual needs or issues. These efforts will include a variety of outreach techniques such as written messages in appropriate languages, flyers, brochures, telephone calls, open house events, and emails as available.

Health and Wellness:

- Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.
- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.
- Staff will assist tenants identify and access community services needed to meet tenant's specific needs or to make progress toward identified goals.

Housing Stability:

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.
- Staff will provide information on various topics that will help tenants maintain their housing; provide assistance in communicating with, responding to, and meeting with property management to help tenants resolve issues related to housing; provide assistance in the remedy of incidences and/or lease violations that could lead to eviction by establishing written plans; and/or provide assistance with conflict resolution for tenants who need to solve problems or resolve conflicts with other tenants.

Community Engagement:

- Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.
- Staff will provide tenants with opportunities to participate in organized gatherings for peer support, social connections, celebrations/commemorations, and other community events held onsite.
- Staff will provide trainings and educational workshops on a variety of topics relating to health, wellness, finance, housing, and other topics.

V. Location and Time of Services

Services will be provided at 25 Sanchez Street, Monday through Friday during regular office hours of 9 a.m. to 5 p.m., excluding holidays. On occasion, workshops or events will be provided after hours or on weekends.

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.
- Grantee will communicate and collaborate regularly with DAAS to help provide logistical and operational support to the program and to provide quality services to tenants.
- Grantee will work collaboratively with DAAS to strategize program direction and services provision.
- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
- Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, and provide documentation that tracks demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Grantee will have individual and group service encounters with at least 65% of the tenants per month.
- Grantee will provide to tenants a minimum of two (2) activities or events per week (or 104 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.

• All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel "strongly" or "very strongly" about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: "How strongly do you feel about being connected and involved in the tenant/resident community at [site]? The options should be "Very strongly", "Strongly", "Somewhat", "Not at all".
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will "agree" or "highly agree" that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: "Do you have better access to services that improve your health and wellness?" The options should be "Highly agree", "Agree", "Neutral", "Disagree", "Highly disagree".
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
 - Number and percentage of unduplicated tenants with individual and group service encounters.
 - Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.

- Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "strongly" or "very strongly" when asked about being connected and involved in their tenant/resident community.
- Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "agree" or "highly agree" when asked about having better access to services that improve their health and wellness.
- Number and percentage of households that have maintained or have obtained a stable housing.
- C. Grantee will provide Ad Hoc reports as required by the Department.
- D. For assistance with reporting requirements or submission of reports, contact:

Rocio.Duenas@sfgov.org Contract Manager, Office of Contract Management Human Services Agency

or

Fanny.Lapitan@sfgov.org Program Analyst, Long Term Care Operations Department of Aging and Adult Services

X. Monitoring Activities

- A. <u>Program Monitoring</u>: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.
- B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.
| | A | В | С | E |
|----------|---|----------------------|----------------------|-----------------------|
| 1 | | | | Appendix B-4, Page 1 |
| 2 | | | Docur | ment Date: 4/18/2017 |
| 3 | HUMAN SERVICES AGENCY | CONTRACT BUD | GET SUMMARY | |
| 4 | | BY PROGRA | M | |
| 5 | Contractor's Name | | Contract Term: | |
| 6 | BRIDGE Housing Corporation | | 7/1/2017 - 6/30/2019 | |
| 7 | (Check One) New RenewalX | Modification | | |
| 8 | If modification, Effective Date of Mod. No. | of Mod. | | |
| | | | | |
| 9 | Program: Rental Assistance Demonstration - 25 | 5 Sanchez | | |
| 10 | Budget Reference Page No.(s) | | | TOTAL |
| | Program Term | 7/1/17 - 6/30/18 | 7/1/18 - 6/30/19 | 7/1/17-6/30/19 |
| 12 | Human Services Agency Expenditures | | | |
| _ | Salaries & Benefits | \$0 | \$0 | \$0 |
| | Operating Expense | \$57,687 | \$58,697 | \$116,384 |
| | Capital Expenditure Subtotal | \$0
\$57,687 | \$0
\$58,697 | \$0
\$116,384 |
| | Indirect Percentage (%) | | | |
| | Indirect Cost (Line 16 X Line 17) | 10.81% | 8.90% | |
| | Total HSA Expenditures | \$6,234 | \$5,224 | \$11,458
\$127,842 |
| 20 | Developer Match Expenditures | \$63,921 | \$63,921 | ¢127,042 |
| - | Salaries & Benefits | \$0 | \$0 | \$0 |
| | Operating Expense | \$73,100 | \$74,380 | \$147,480 |
| | Capital Expenditure | \$0 | \$0
\$0 | \$0 |
| | Subtotal | \$73,100 | \$74,380 | \$147,480 |
| | Indirect Percentage (%) | 10.81% | 8.90% | \$111,100 |
| | Indirect Cost (Line 16 X Line 17) | \$7,900 | \$6,620 | \$14,520 |
| | Total Developer Expenditures | \$81,000 | \$81,000 | \$162,000 |
| 28 | | +- , | ÷- , | + - , |
| 29 | Total HSA and Developer Expenditures | \$144,921 | \$144,921 | \$289,842 |
| 30 | HSA Revenues | | | |
| 31 | Local General Fund | \$63,921 | \$63,921 | \$127,842 |
| 32 | | | | |
| 33 | | | | |
| 34 | | | | |
| 35 | | | | |
| 36
37 | | | | |
| 38 | | | | |
| 39 | TOTAL HSA REVENUES | \$63,921 | \$63,921 | \$127,842 |
| 40 | Developer Revenues | ψ00,921 | φ00,921 | ψ121,042 |
| 40 | Developer Match Funds | \$81,000 | \$81,000 | \$162,000 |
| 42 | | <i>\$</i> 01,000 | | \$0 |
| 43 | | | | \$0 |
| 44 | | | | \$0 |
| 45 | Total Developer Revenues | \$81,000 | \$81,000 | \$162,000 |
| 46 | Total Revenues | \$144,921 | \$144,921 | \$289,842 |
| 47 | Full Time Equivalent (FTE) | 1.60 | | |
| 49 | Prepared by: Susan Neufeld | Telephone No.: 415-3 | 321-3526 | Date 4/18/17 |
| | HSA-CO Review Signature: | · | | |
| | | | | • |
| 51
52 | HSA #1 | | | |
| 52 | | | | |

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1	· · ·				•				endix B-4, Page 2
2							Do	cumer	nt Date: 4/18/2017
4	Contractor's Name: BRIDGE Housing Corporat	tion							
5 6									
7		Ope	rating	j Expense l	Detai	il			
8		-							
9				an Services Agency	Hu	uman Services Agency			TOTAL
	HSA Expenditure Category	TERM		7 - 6/30/18	7	/1/18 - 6/30/19		7/	1/17-6/30/19
11	Rental of Property								
12	Telephone and Office Furniture								
13	Program/Office Supplies		\$	1,400	\$	1,400	· _	\$	2,800
	Utilities (Electricity, Water, Sewer, Gas, Phone)		\$	155	\$	155		\$	310
	Printing and Reproduction		\$	40	\$	40	· –	\$	80
	Insurance		Ψ		<u>_</u>	10	· -	Ψ	
			¢	200	¢	200	· –	¢	400
	Staff Travel (Local & Out of Town)		\$	200	\$	200	· _	\$	400
	Law Library						· -		
	Membership/Dues						· –		
	Rental of Equipment						· -		
21 22	Senior Right Bulletin						· –		
	Staff Training		\$	745	\$	745	· -	\$	1,490
	Sub-Contractor (NCPHS)	_	\$	53,827	\$	54,837		\$	108,664
25	OTHER								
	Language Line	_					· _		
	Pangea/AASC Database Educational Programs	_	\$	1,320	\$	1,320	· -	\$	2,640
20							· -		
30		_					· –		
31	TOTAL HSA OPERATING EXPENSE		\$	57,687	\$	58,697		\$	116,384
32									
33	Developer Match Operating Expense								
34	Rental of Property								
	Telephone and Furniture						. –		
	Office Supplies, Postage								
	Printing and Reproduction						· _		
	Insurance						· _		
	Law Library						· _		
							· -		
	Membership/Dues						· –		
	Rental of Equipment						· _		
	Volunteer Expenses (Receptionist/intake)						· _		
	Client Costs						· –		
	Educational Programs						· -		
	Charting						· –		
	Staff Training						· _		
	Sub-Contractor (NCPHS)		\$	73,100	\$	74,380	· –	\$	147,480
48									
49 50	TOTAL DEVELOPER OPERATING EXPENSE		\$	73,100	\$	74,380	· –	\$	147,480
50	TOTAL OPERATING EXPENSE		\$	130,787	\$	133,077		\$	263,864
52	HSA #3						_		
55									

APPENDIX A-5 – SERVICES TO BE PROVIDED BRIDGE HOUSING CORPORATION

RAD Housing Support Services at 255 Woodside Avenue July 1, 2017 through June 30, 2019

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that results in substantial functional limitations in one or more major life activity.
Grantee	BRIDGE Housing Corporation
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units at 255 Woodside Avenue.

IV. Description of Services

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities
 - Build tenant base
 - Develop neighborhood partnerships
- 2) Community Building
 - Community organizing and events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities
- 3) Service Connection
 - Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will hire, train, and supervise 1.5 FTE (leveraged and/or grant funded) to provide services at 255 Woodside Avenue during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.
- Staff will make efforts to contact all new tenants to invite them to make use of support services and inform them of community activities.
- Staff will make efforts to contact, interact, inform, and invite all tenants to make uses of support services to assist with and address individual needs or issues. These efforts will include a variety of outreach techniques such as written messages in appropriate languages, flyers, brochures, telephone calls, open house events, and emails as available.

Health and Wellness:

- Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.
- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.
- Staff will assist tenants identify and access community services needed to meet tenant's specific needs or to make progress toward identified goals.

Housing Stability:

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.
- Staff will provide information on various topics that will help tenants maintain their housing; provide assistance in communicating with, responding to, and meeting with property management to help tenants resolve issues related to housing; provide assistance in the remedy of incidences and/or lease violations that could lead to eviction by establishing written plans; and/or provide assistance with conflict resolution for tenants who need to solve problems or resolve conflicts with other tenants.

Community Engagement:

- Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.
- Staff will provide tenants with opportunities to participate in organized gatherings for peer support, social connections, celebrations/commemorations, and other community events held onsite.
- Staff will provide trainings and educational workshops on a variety of topics relating to health, wellness, finance, housing, and other topics.

V. Location and Time of Services

Services will be provided at 255 Woodside Avenue, Monday through Friday during regular office hours of 9 a.m. to 5 p.m., excluding holidays. On occasion, workshops or events will be provided after hours or on weekends.

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.
- Grantee will communicate and collaborate regularly with DAAS to help provide logistical and operational support to the program and to provide quality services to tenants.
- Grantee will work collaboratively with DAAS to strategize program direction and services provision.
- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
- Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, and provide documentation that tracks demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Grantee will have individual and group service encounters with at least 65% of the tenants per month.
- Grantee will provide to tenants a minimum of two (2) activities or events per week (or 104 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.

• All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel "strongly" or "very strongly" about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: "How strongly do you feel about being connected and involved in the tenant/resident community at [site]? The options should be "Very strongly", "Strongly", "Somewhat", "Not at all".
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will "agree" or "highly agree" that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: "Do you have better access to services that improve your health and wellness?" The options should be "Highly agree", "Agree", "Neutral", "Disagree", "Highly disagree".
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
 - Number and percentage of unduplicated tenants with individual and group service encounters.
 - Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.

- Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "strongly" or "very strongly" when asked about being connected and involved in their tenant/resident community.
- Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "agree" or "highly agree" when asked about having better access to services that improve their health and wellness.
- Number and percentage of households that have maintained or have obtained a stable housing.
- C. Grantee will provide Ad Hoc reports as required by the Department.
- D. For assistance with reporting requirements or submission of reports, contact:

Rocio.Duenas@sfgov.org Contract Manager, Office of Contract Management Human Services Agency

or

Fanny.Lapitan@sfgov.org Program Analyst, Long Term Care Operations Department of Aging and Adult Services

X. Monitoring Activities

- A. <u>Program Monitoring</u>: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.
- B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	В	С	E
1			A	ppendix B-5, Page 1
2			Docum	nent Date: 4/18/2017
3	HUMAN SERVICES AGENCY	CONTRACT BUD	GET SUMMARY	
4		BY PROGRA	M	
5	Contractor's Name		Contract Term:	
6	BRIDGE Housing Corporation		6/1/2017 - 7/30/2019	
7		Modification	0,1,2011 1,00,2010	
	· · · · · · -			
8	If modification, Effective Date of Mod. No. c	of Mod.	r r	
9	Program: Rental Assistance Demonstration - 25	5 Woodside		
				TOTAL
	Budget Reference Page No.(s) Program Term	7/1/17 - 6/30/18	7/1/18 - 6/30/19	7/1/17-6/30/19
12	Human Services Agency Expenditures	1/1/17 - 0/30/10	7/1/10 - 0/30/19	1/1/17-0/30/19
	Salaries & Benefits	\$0	\$0	\$0
	Operating Expense	\$81,935	\$83,099	\$165,034
	Capital Expenditure	\$0	\$0	\$0
-	Subtotal	\$81,935	\$83,099	\$165,034
17	Indirect Percentage (%)	14.00%	12.40%	
18	Indirect Cost (Line 16 X Line 17)	\$11,471	\$10,308	\$21,778
19	Total HSA Expenditures	\$93,406	\$93,406	\$186,812
20	Developer Match Expenditures			
	Salaries & Benefits	\$0	\$0	\$0
22	Operating Expense	\$71,053	\$72,061	\$143,114
	Capital Expenditure	\$0	\$0	\$0
	Subtotal	\$71,053	\$72,061	\$143,114
20	Indirect Percentage (%)	14.00%	12.40%	
26	Indirect Cost (Line 16 X Line 17)	\$9,947	\$8,939	\$18,886
27	Total Developer Expenditures	\$81,000	\$81,000	\$162,000
28				
	Total HSA and Developer Expenditures	\$174,406	\$174,406	\$348,812
30	HSA Revenues			
-	Local General Fund	\$93,406	\$93,406	\$186,812
32				
33 34				
35				
36				
37				
38				
39	TOTAL HSA REVENUES	\$93,406	\$93,406	\$186,812
40	Developer Revenues			•
41	Developer Match Funds	\$81,000	\$81,000	\$162,000
42				\$0
43				\$0
44		\$ 04,000	\$ 04,000	\$0
45	Total Developer Revenues	\$81,000	\$81,000	\$162,000
46	Total Revenues	\$174,406	\$174,406	\$348,812
47	Full Time Equivalent (FTE)	1.80		
49	Prepared by: Susan Neufeld	Telephone No.: 415-3	21-3526	Date 4/18/17
50	HSA-CO Review Signature:			
51	HSA #1			
52				

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1	· · · · ·				•			dix B-5, Page 2
2							Document	Date: 4/18/2017
4	Contractor's Name: BRIDGE Housing Corporat	ion						
6								
7		Оре	rating	g Expense D	etail			
8			Hum	an Services	Hum	an Services		
9				Agency		Agency		TOTAL
	HSA Expenditure Category	TERM	7/1/	17 - 6/30/18	7/1/	18 - 6/30/19	7/1/	17-6/30/19
	Rental of Property							
	Telephone and Office Furniture							
	Program/Office Supplies		\$	1,523	\$	1,659	\$	3,182
14	Utilities (Electricity, Water, Sewer, Gas, Phone)		\$	1,300	\$	1,300	\$	2,600
15	Printing and Reproduction		\$	40	\$	40	\$	80
16	Insurance							
17	Staff Travel (Local & Out of Town)		\$	200	\$	200	\$	400
18	Law Library							
19	Membership/Dues							
20	Rental of Equipment							
	Senior Right Bulletin							
22	Staff Training		¢	900	\$	900	¢	1,800
	Sub-Contractor (NCPHS)		\$\$	76,372	<u>э</u> \$	77,400	\$ \$	1,800
	OTHER	_		<u> </u>		<u>, </u>		,
	Language Line	_						
	Pangea/AASC Database		\$	1,600	\$	1,600	\$	3,200
28 29	Educational Programs							
30		_						
31	TOTAL HSA OPERATING EXPENSE		\$	81,935	\$	83,099	\$	165,034
32								
33	Developer Match Operating Expense							
34	Rental of Property							
35	Telephone and Furniture							
36	Office Supplies, Postage							
	Printing and Reproduction							
	Insurance							
	Law Library							
	Membership/Dues							
	Rental of Equipment							
	Volunteer Expenses (Receptionist/intake)							
	Client Costs							
	Educational Programs							
	Charting							
	Staff Training							
	Sub-Contractor (NCPHS)		\$	71,053	\$	72,061	\$	143,114
48								·
49	TOTAL DEVELOPER OPERATING EXPENSE		\$	71,053	\$	72,061	\$	143,114
50 51	TOTAL OPERATING EXPENSE		\$	152,988	\$	155,160	\$	308,148
52			ψ	102,900	Φ	100,100	φ	300,140
53	HSA #3							

APPENDIX A-1 – SERVICES TO BE PROVIDED CHINATOWN COMMUNITY DEVELOPMENT CENTER

RAD Housing Support Services at 227 Bay Street July 1, 2017 through June 30, 2019

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that results in substantial functional limitations in one or more major life activity.
Grantee	Chinatown Community Development Center (Chinatown CDC)
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units at 227 Bay Street.

IV. Description of Services

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities
 - Build tenant base
 - Develop neighborhood partnerships
- 2) Community Building
 - Community organizing and events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities
- 3) Service Connection
 - Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will hire, train, and supervise 0.35 FTE (leveraged and/or grant funded) to provide services at 227 Bay Street during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.
- Staff will make efforts to contact all new tenants to invite them to make use of support services and inform them of community activities.
- Keep residents informed about the construction schedule as well as possible impacts to the amenities and pathways at the property

Health and Wellness:

• Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.

- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.
- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.

Housing Stability:

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.

Community Engagement:

- Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.
- Organize monthly resident and staff meetings

V. Location and Time of Services

Services will be provided at 227 Bay Street, Monday through Friday during regular office hours of 9 a.m. to 6 p.m., excluding holidays.

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.
- Grantee will communicate and collaborate regularly with DAAS to help provide logistical and operational support to the program and to provide quality services to tenants.

- Grantee will work collaboratively with DAAS to strategize program direction and services provision.
- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
- Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, and provide documentation that tracks demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

For grant period of July 1, 2017 through December 31, 2017:

- Grantee will have individual and group service encounters with at least 65% of the tenants per month.
- Grantee will provide to tenants a minimum of 26 activities or events semiannually. At least six (6) of those activities or events semi-annually are an educational training, presentation, or workshop.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

For grant period of January 1, 2018 through June 30, 2019:

- Grantee will have individual and group service encounters with at least 65% unduplicated tenants per month.
- Grantee will provide to tenants a minimum of two (2) activities or events per week (or 104 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel "strongly" or "very strongly" about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: "How strongly do you feel about being connected and involved in the tenant/resident community at [site]? The options should be "Very strongly", "Strongly", "Somewhat", "Not at all".
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will "agree" or "highly agree" that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: "Do you have better access to services that improve your health and wellness?" The options should be "Highly agree", "Agree", "Neutral", "Disagree", "Highly disagree".
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
 - Number and percentage of unduplicated tenants with individual and group service encounters.
 - Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.

- Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "strongly" or "very strongly" when asked about being connected and involved in their tenant/resident community.
- Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "agree" or "highly agree" when asked about having better access to services that improve their health and wellness.
- Number and percentage of households that have maintained or have obtained a stable housing.
- C. Grantee will provide Ad Hoc reports as required by the Department.
- D. For assistance with reporting requirements or submission of reports, contact:

Drake.Herrador@sfgov.org Contract Manager, Office of Contract Management Human Services Agency

or

Fanny.Lapitan@sfgov.org Program Analyst, Long Term Care Operations Department of Aging and Adult Services

X. Monitoring Activities

- A. <u>Program Monitoring</u>: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.
- B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

—	A	В	С	F									
1			-	Appendix B-1, Page 1									
2			Do	cument Date: 4/20/2017									
3	HUMAN SERVICES												
4		BY PROGR											
-		DIFROGR											
5	Name												
6	Chinatown Community Development Center												
7	(Check One) New 🗌 Renewal <u>X</u> Modification												
8	If modification, Effective Date of Mod. No. of Mod.												
9	Program: Rental Assistance Housing Support Services - 227 Bay St. TOTAL												
10	Budget Reference Page No.(s)												
11	Program Term	7/1/17-6/30/18	7/1/18-6/30/19	7/1/17 - 6/30/19									
12	Expenditures												
-	Salaries & Benefits	\$35,038	\$35,038	\$70,076									
14		\$9,154	\$9,154	\$18,308									
15	Subtotal	\$44,192	\$44,192	\$88,384									
16	Indirect Percentage (%)	13%	13%	13%									
	Indirect Cost (Line 16 X Line 15)	\$5,745	\$5,745	\$11,490									
18		\$0	\$0	\$0									
19	Total Expenditures	\$49,937	\$49,937	\$99,874									
20	HSA Revenues												
21	Local General Fund	\$49,937	\$49,937	\$99,874									
22													
23													
24													
25													
26													
27 28													
		¢ 40,007	¢40.007	¢00.074									
	TOTAL HSA REVENUES	\$49,937	\$49,937	\$99,874									
30	Other Revenues												
31 32													
33													
34													
35													
36	Total Revenues	\$49,937	\$49,937	\$99,874									
	Full Time Equivalent (FTE)												
39	Prepared by: Joseph Fu	Telephone No.: 415	-984-1487	Date: 4/20/2017									
	HSA-CO Review Signature:												
	HSA #1			- 11/15/2007									
1 7 1				11/13/2007									

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1							Do	Appendix B-1, Page 2 cument Date: 4/20/2017						
3														
4	Program: Rental Assistance Hous (Same as Line 9 on HSA #1)	sing Support Se	ervices - 22	27 Bay St.										
6														
7			Salari	es & Benef	its Detail									
8														
9 10	7/1/17-6/30/18 7/1/18-6/30/19													
11		Agency T	otals	For HSA	Program	For HSA Program	For DHS Program	TOTAL						
		Annual Full TimeSalary	Total %		Adjusted									
12	POSITION TITLE	for FTE	FTE	% FTE	FTE	Budgeted Salary	Budgeted Salary	7/1/17 to 6/30/19						
13	Resident Services Coordinator	\$53,913	100%	40.00%	40.00%	\$21,565	\$21,565	\$43,130						
14	Resident Services Assistant	\$40,976	100%	5.00%	5.00%	\$2,049	\$2,049	\$4,098						
15	Supervisor	\$58,604	100%	5.00%	5.00%	\$2,930	\$2,930	\$5,860						
16								\$0						
17								\$0						
18								\$0						
19								\$0						
20								\$0						
21								\$0						
22								\$0						
23								\$0						
24								\$0						
25								\$0						
26								\$0						
27								\$0						
28								\$0						
29								\$0						
30	TOTALS		3.00	0.50	0.50	26,544	26,544	\$53,088						
31 32	FRINGE BENEFIT RATE	32.000%												
33	EMPLOYEE FRINGE BENEFITS					8,494	8,494	\$16,988						
34 35														
	TOTAL SALARIES & BENEFITS	\$0				35,038	35,038	\$70,076						
	HSA #2							11/15/2007						

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1			-				_	Appe	ndix B-	1, Page 3				
2							Γ	Docume	nt Date	e: 4/20/2017				
3														
4				port Ser	vices - 227 Bay	v St.								
5	(Same as Line	e 9 on HSA #1)												
6 7		Operating Expense Detail												
8														
9														
10														
11										OTAL				
	Expenditure C			TERM	7/1/17-6/30/18		7/1/18-6/30/19			7 - 6/30/19				
13	Rental of Prop	erty			\$1,000)	\$1,000)	\$	2,000				
14	Utilities(Elec, \	Water, Gas, Ph	none, Scaven	ger)	\$600)	\$600)	\$	1,200				
15	Office Supplie	s, Postage			\$500)	\$500)	\$	1,000				
16	Building Maint	enance Suppli	es and Repair											
17	Printing and R	eproduction												
18	Insurance													
19	Staff Training													
20	Staff Travel-(L	ocal & Out of T	Fown)		\$250)	\$250)	\$	500				
21	Rental of Equi	pment												
22	CONSULTANT/S	UBCONTRACTOF	RDESCRIPTIVE	TITLE										
23	Clinical Consu	Itation Fees												
24														
25				_										
26				_										
27				_										
-	OTHER													
29	Job Posting Fe			_										
30		nagement subs	scription	_										
31	Meeting exper		• • • •	_										
	MIS expenses	: computer ser	vicing											
33 34	Janitorial Tenant Activiti	05		_	\$6,804		\$6,804		\$	13,608				
35		53		_	φ0,004	<u>+</u> -	φ0,604	<u> </u>	ψ	13,000				
36	TOTAL OPER	ATING EXPEN	ISE		\$9,154	1	\$9,154	Ļ		\$18,308				
37														
	HSA #3									11/15/2007				

APPENDIX A-2 – SERVICES TO BE PROVIDED CHINATOWN COMMUNITY DEVELOPMENT CENTER

RAD Housing Support Services at 990 Pacific Avenue July 1, 2017 through June 30, 2019

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that results in substantial functional limitations in one or more major life activity.
Grantee	Chinatown Community Development Center (Chinatown CDC)
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units at 990 Pacific Avenue.

IV. Description of Services

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities
 - Build tenant base
 - Develop neighborhood partnerships
- 2) Community Building
 - Community organizing and events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities
- 3) Service Connection
 - Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will hire, train, and supervise 1.25 FTE (leveraged and/or grant funded) to provide services at 990 Pacific Avenue during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.
- Staff will make efforts to contact all new tenants to invite them to make use of support services and inform them of community activities.
- Keep residents informed about the construction schedule as well as possible impacts to the amenities and pathways at the property

Health and Wellness:

• Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.

- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.
- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.
- Coordinate off-site programming for residents to access during exterior construction period, prior to relocation

Housing Stability:

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.

Community Engagement:

- Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being
- Organize monthly resident and staff meetings

V. Location and Time of Services

Services will be provided at 990 Pacific Avenue, Monday through Friday during regular office hours of 9 a.m. to 6 p.m., excluding holidays.

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.

- Grantee will communicate and collaborate regularly with DAAS to help provide logistical and operational support to the program and to provide quality services to tenants.
- Grantee will work collaboratively with DAAS to strategize program direction and services provision.
- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
- Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, and provide documentation that tracks demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

For grant period of July 1, 2017 through December 31, 2017:

- Grantee will have individual and group service encounters with at least 65% of the tenants per month.
- Grantee will provide to tenants a minimum of 26 activities or events semiannually. At least six (6) of those activities or events semi-annually are an educational training, presentation, or workshop.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

For grant period of January 1, 2018 through June 30, 2019:

- Grantee will have individual and group service encounters with at least 65% unduplicated tenants per month.
- Grantee will provide to tenants a minimum of two (2) activities or events per week (or 104 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel "strongly" or "very strongly" about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: "How strongly do you feel about being connected and involved in the tenant/resident community at [site]? The options should be "Very strongly", "Strongly", "Somewhat", "Not at all".
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will "agree" or "highly agree" that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: "Do you have better access to services that improve your health and wellness?" The options should be "Highly agree", "Agree", "Neutral", "Disagree", "Highly disagree".
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
 - Number and percentage of unduplicated tenants with individual and group service encounters.
 - Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
 - Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "strongly" or "very strongly" when

asked about being connected and involved in their tenant/resident community.

- Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "agree" or "highly agree" when asked about having better access to services that improve their health and wellness.
- Number and percentage of households that have maintained or have obtained a stable housing.
- C. Grantee will provide Ad Hoc reports as required by the Department.
- D. For assistance with reporting requirements or submission of reports, contact:

Drake.Herrador@sfgov.org Contract Manager, Office of Contract Management Human Services Agency

or

Fanny.Lapitan@sfgov.org Program Analyst, Long Term Care Operations Department of Aging and Adult Services

X. Monitoring Activities

- A. <u>Program Monitoring</u>: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.
- B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

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1		5	-	Appendix B-2, Page 1									
2				ment Date: 4/20/2017									
_	HUMAN SERVICES												
3	HUWAN SERVICES												
4		BY PROGR											
5	Name												
6	Chinatown Community Development Center												
7	(Check One) New 🗌 Renewal <u>X</u> Modification												
8	If modification, Effective Date of Mod	I. No. of Mod.											
	If modification, Effective Date of Moc Program: Rental Assistance Hous	ing Support Servic	es - 990 Pacific										
9	Ave			TOTAL									
10	Budget Reference Page No.(s)												
11	Program Term	7/1/17 - 6/30/18	7/1/18 - 6/30/19	7/1/17 - 6/30/19									
12	Expenditures	11111 - 0/00/10	11110 - 0130/13	1/1/11 - 0/30/13									
13	Salaries & Benefits	\$93,659	\$93,659	\$187,318									
	Operating Expense	\$27,911	\$27,911	\$55,822									
15	Subtotal	\$121,570	\$121,570	\$243,140									
16	Indirect Percentage (%)	13%	13%	· · ·									
17	Indirect Cost (Line 16 X Line 15)	\$15,804	\$15,804	\$31,608									
18	· · · · · · · · · · · · · · · · · · ·	\$0	\$0	\$0									
19	Total Expenditures	\$137,374	\$137,374	\$274,748									
20	HSA Revenues												
21	Local General Fund	\$137,374	\$137,374	\$274,748									
22													
23													
24													
25													
26													
27													
28													
29	TOTAL HSA REVENUES	\$137,374	\$137,374	\$274,748									
30	Other Revenues												
31													
32													
33 34													
35													
		* • • • • • • • • • • • • • • • • •	• • • • • • • •	*									
36	Total Revenues	\$137,374	\$137,374	\$274,748									
37	Full Time Equivalent (FTE)												
39	Prepared by: Joseph Fu	Telephone No.: 415	-984-1487	Date: 4/20/2017									
40	HSA-CO Review Signature:			_									
41	HSA #1			11/15/2007									

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1								opendix B-2, Page 2				
2							Docum	ent Date: 4/20/2017				
4	Program: Rental Assistance Hous	sing Support S	ervices - 9	90 Pacific Av	е							
5	(Same as Line 9 on HSA #1)	0 11										
6												
7			Salarie	es & Benef	its Detail							
8												
9												
10 11												
		Annual Full	lotais		Program	FOI HSA PIOgrafii	FOI DHS FIOGIAIII	TOTAL				
		TimeSalary	Total %		Adjusted							
12	POSITION TITLE	for FTE	FTE	% FTE	FTE	Budgeted Salary	Budgeted Salary	7/1/12 to 6/30/16				
13	Resident Services Coordinator	\$41,475	100%	80.00%	80.00%	\$33,180	\$33,180	\$66,360				
14	SR. Resident Services Coordinator	\$49,774	100%	60.00%	60.00%	\$29,865	\$29,865	\$59,729				
15	Health Services Supervisor	\$58,604	100%	10.00%	10.00%	\$5,860	\$5,860	\$11,721				
16	Resident Services Assistant	\$40,976	100%	5.00%	5.00%	\$2,049	\$2,049	\$4,098				
17								\$0				
18								\$0				
19								\$0				
20								\$0				
21								\$0				
22								\$0				
23								\$0				
24								\$0				
25								\$0				
26								\$0				
27								\$0				
28								\$0				
29								\$0				
30	TOTALS		4.00	1.55	1.55	70,954	70,954	\$141,908				
31 32	FRINGE BENEFIT RATE	32.000%										
	EMPLOYEE FRINGE BENEFITS					22,705	22,705	\$45,410				
34 35												
	TOTAL SALARIES & BENEFITS	\$0				93,659	93,659	\$187,318				
37	HSA #2							11/15/2007				

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2										
3										
4	Program: Rental Assistance Housing Support Services - 990 Pacific Ave									
5 6	(Same as Line 9 on HSA #1)									
7		Operating Expense Detail								
8										
9										
10										
11 12	Expenditure C	ategory		TERM	7/1/17 - 6/30/18	7/	/1/18 - 6/30/19		7/1/	TOTAL 17 - 6/30/19
	Rental of Prop				\$5,000		\$5,000		\$	10,000.00
	Utilities(Elec, \		one Scaveno	nor)	\$2,500	·	\$2,500		<u>\$</u>	5,000.00
				,,	\$2,800		\$2,800		<u>φ</u> \$	5,600.00
	Office Supplies, Postage Building Maintenance Supplies and Repair			φ2,000		φ2,000	· <u> </u>	Ψ	0,000.00	
	Printing and R		es anu Repair		\$100		\$100		\$	200.00
		eproduction			\$100		\$100		ψ	200.00
	Insurance				\$1 000	·	\$4 ,000	· _	^	0.000.00
	Staff Training		_ 、		\$1,000	·	\$1,000	<u> </u>		2,000.00
	Staff Travel-(L		lown)		\$1,000	·	\$1,000		\$	2,000.00
21	Rental of Equi	pment			\$1,200		\$1,200	-	\$	2,400.00
	CONSULTANT/S				* + * *				•	
	Professional S	services for ten	ant relocation	activitie	\$4,000			· _	\$	4,000.00
24 25				_						
26				_						
27				_		·		• —		
	OTHER			-				· _		
29	Job Posting Fe	ees						_		
30	Dues/data ma		scription	_				· _		
	Meeting exper			_	\$250		\$250		\$	500.00
	MIS expenses	: computer ser	vicing	_						
33	Janitorial			_	\$900	· . <u> </u>	\$900		\$	1,800.00
34	Tenant Activiti	es		_	\$9,161	. <u> </u>	\$13,161	<u> </u>	\$	22,322.00
35					¢07.044		007 04 4			Ф <i>Е</i> <u>с</u> 000
36	TOTAL OPER		NGE		\$27,911		\$27,911			\$55,822
37										
38	HSA #3									11/15/2007

APPENDIX A-1 – SERVICES TO BE PROVIDED COMMUNITY HOUSING PARTNERSHIP

RAD Housing Support Services at 1750 McAllister Street July 1, 2017 through June 30, 2019

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that results in substantial functional limitations in one or more major life activity.
Grantee	Community Housing Partnership
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted housing development units at 1750 McAllister Street.

IV. Description of Services

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities
 - Build tenant base
 - Develop neighborhood partnerships
- 2) Community Building
 - Facilitate community organizing and host events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase access to information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities
- 3) Service Connection
 - Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will hire, train, and supervise 1.2 FTE (leveraged and/or grant funded) to provide services at 1750 McAllister Street during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.
- Staff will make efforts to contact all new tenants to invite them to make use of support services and inform them of community activities.

Health and Wellness:

- Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.

- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.

Housing Stability:

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.

Community Engagement:

• Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.

V. Location and Time of Services

Services will be provided at 1750 McAllister Street, Monday through Friday, during regular office hours of 9 a.m. to 5 p.m., with potential variations due to scheduled evening or weekend hours, and excluding holidays.

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.
- Grantee will communicate and collaborate regularly with DAAS to help provide logistical and operational support to the program and to provide quality services to tenants.
- Grantee will work collaboratively with DAAS to strategize program direction and services provision.

- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
- Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, and provide documentation that tracks demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Grantee will have individual and group service encounters with at least 50% of the tenants per month.
- Grantee will provide to tenants a minimum of one (1) activity or event per week (or 52 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel "strongly" or "very strongly" about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: "How strongly do you feel about being connected and involved in the tenant/resident community at [site]? The options should be "Very strongly", "Strongly", "Somewhat", "Not at all".
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will "agree" or "highly agree" that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: "Do you have better access to services that improve your health and wellness?" The options should be "Highly agree", "Agree", "Neutral", "Disagree", "Highly disagree".
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
 - Number and percentage of unduplicated tenants with individual and group service encounters.
 - Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
 - Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "strongly" or "very strongly" when asked about being connected and involved in their tenant/resident community.
 - Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "agree" or "highly agree" when asked about having better access to services that improve their health and wellness.
 - Number and percentage of households that have maintained or have obtained a stable housing.
- C. Grantee will provide Ad Hoc reports as required by the Department.
- D. For assistance with reporting requirements or submission of reports, contact:

Rocio.Duenas@sfgov.org Contract Manager, Office of Contract Management Human Services Agency

or

Fanny.Lapitan@sfgov.org Program Analyst, Long Term Care Operations Department of Aging and Adult Services

X. Monitoring Activities

- A. <u>Program Monitoring</u>: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.
- B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

1 Appendix B-1, Page 1 Document Date: 5/25/2017 3 HUMAN SERVICES AGENCY BUDGET SUMMARY BY PROGRAM 5 Name 6 Community Housing Partnership 6 Community Housing Partnership 7 (Check One) 8 It modification, Effective Date of Mod. 9 Program: Rental Assistance Demonstration - 1750 McAllister 10 Budget Reference Page No.(s) 11 Program Term 7/1/17-6/30/18 7/1/18-6/30/19 12 Expenditures 3 Salaries & Benefits \$49,777 3 Salaries & Benefits \$49,777 13 Salaries & Benefits 5 \$udget Reference Page No.(s) 11 Program Term 13 Salaries & Benefits 5 \$udget Reference Page No.(s) 13 Salaries & Benefits 5 \$udget Reference Page No.(s) 14 Operating Expense 5 \$udget Reference Page No.(s) 16 Indirect Cost (Line 16 X Line 15) 17 Indirect Cost (Line 16 X		Α	В	С	E				
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41 HSA #1 5/25/2017	40	HSA-CO Review Signature:							
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2 3 4 Program Name: 5 (Same as Line 9 on HSA #1) 6	ndix B-1, Page 2 Date: 5/25/17											
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4	Program Nam	<u>.</u>										
4 5	•	e. 9 on HSA #1)										
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7	Operating Expense Detail											
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12	Expenditure C	ategory		TERM	7/1/1	7-6/30/18		7/1/1	8-6/30/19	7/1/	17-6/30/19	
13	Rental of Prop	erty			\$	130		\$	130	\$	261	
14	Utilities(Elec, \	Nater, Gas, Pł	none, Scavenge	er)	\$	1,537		\$	1,537	\$	3,073	
15	Office Supplies	s, Postage			\$	809		\$	809	\$	1,619	
16	Building Maint	enance Suppli	es and Repair		\$	1,065		\$	1,065	\$	2,131	
17	Printing and R	eproduction			\$	745		\$	745	\$	1,490	
18	Insurance				\$	155		\$	155	\$	310	
19	Staff Training				\$	569		\$	569	\$	1,138	
20	Staff Travel-(L	ocal & Out of T	「own)		\$	150		\$	150	\$	300	
21	Rental of Equi	pment			\$	1,840		\$	1,840	\$	3,679	
22	CONSULTANT/SU	JBCONTRACTOF	R DESCRIPTIVE T	ITLE								
23	Professional S	Service		_								
24				-								
25 26				-								
20				-								
28	OTHER			-								
29	Payroll Expense	ses			\$	159		\$	159	\$	319	
30	Audit/Accounti			-	\$	127		\$	127	\$	254	
31	Office Equipm		Support)	-	\$	328		\$	328	\$	656	
32	Organizational		ff)	-								
33	Tenant Project	ts/Activities		-	\$	725		\$	725	\$	1,450	
34												
35	TOTAL OPER	ATING EXPEN	ISE		\$	8,339		\$	8,339	\$	16,679	
36												
37	HSA #3										10/25/2016	

APPENDIX A-2 – SERVICES TO BE PROVIDED COMMUNITY HOUSING PARTNERSHIP

RAD Housing Support Services at 666 Ellis Street July 1, 2017 through June 30, 2019

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that results in substantial functional limitations in one or more major life activity.
Grantee	Community Housing Partnership
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units at 666 Ellis Street.

IV. Description of Services

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities
 - Build tenant base
 - Develop neighborhood partnerships
- 2) Community Building
 - Community organizing and events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities
- 3) Service Connection
 - Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will hire, train, and supervise 1.2 FTE (leveraged and/or grant funded) to provide services at 666 Ellis Street during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.
- Staff will make efforts to contact all new tenants to invite them to make use of support services and inform them of community activities.

Health and Wellness:

- Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.

- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.

Housing Stability:

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.

Community Engagement:

• Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.

V. Location and Time of Services

Services will be provided at 666 Ellis Street, Monday through Friday during regular office hours of 9 a.m. to 5 p.m., with potential variations due to scheduled evening or weekend hours, and excluding holidays.

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.
- Grantee will communicate and collaborate regularly with DAAS to help provide logistical and operational support to the program and to provide quality services to tenants.
- Grantee will work collaboratively with DAAS to strategize program direction and services provision.

- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
- Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, and provide documentation that tracks demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Grantee will have individual and group service encounters with at least 65% of the tenants per month.
- Grantee will provide to tenants a minimum of two (2) activities or events per week (or 104 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel "strongly" or "very strongly" about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: "How strongly do you feel about being connected and involved in the tenant/resident community at [site]? The options should be "Very strongly", "Strongly", "Somewhat", "Not at all".
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will "agree" or "highly agree" that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: "Do you have better access to services that improve your health and wellness?" The options should be "Highly agree", "Agree", "Neutral", "Disagree", "Highly disagree".
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
 - Number and percentage of unduplicated tenants with individual and group service encounters.
 - Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
 - Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "strongly" or "very strongly" when asked about being connected and involved in their tenant/resident community.
 - Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "agree" or "highly agree" when asked about having better access to services that improve their health and wellness.
 - Number and percentage of households that have maintained or have obtained a stable housing.
- C. Grantee will provide Ad Hoc reports as required by the Department.
- D. For assistance with reporting requirements or submission of reports, contact:

Rocio.Duenas@sfgov.org Contract Manager, Office of Contract Management Human Services Agency

or

Fanny.Lapitan@sfgov.org Program Analyst, Long Term Care Operations Department of Aging and Adult Services

X. Monitoring Activities

- A. <u>Program Monitoring</u>: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.
- B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

20 HSA Revenues 21 General Fund \$ 66,421 \$ 66,421 \$ 132,842 22 23 24 25 26 27 26 27 28 27 28 27 29 TOTAL HSA REVENUES \$ 66,421 \$ 66,421 \$ 132,842 30 Other Revenues 31 32 33 33 32 33 34 35 36 132,842 36 Total Revenues \$ 66,421 \$ 132,842 37 36 Total Revenues \$ 66,421 \$ 132,842 37 37 Full Time Equivalent (FTE) 0.75 75% 38 39 Prepared by: Kani Lin, Controller Telephone No.: 415-852-5322 Date: 4/18/17 40 HSA-CO Review Signature:		A		В		С		E		
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1									Ap	pendi	x B-2, Page 2
2											Date: 5/25/17
4	Program Name:										
5	(Same as Line 9 on HSA #1)										
6											
7	Salaries & Benefits Detail										
8											
9											
10							7/1/	′17-6/30/18	7/1/18-6/30/19		
11			Agency 7	otals	HSA Pro	ogram	DH	S Program	DHS Program		TOTAL
		٨٣	nual Full		% FTE funded by						
			neSalary	Total	HSA	Adjusted					
12	POSITION TITLE		or FTE	FTE	(Max 100%)	FTE	Budg	geted Salary	Budgeted Salary	7/	1/17 to 6/30/19
13	Resident Serivce Team Lead	\$	48,220	1.00	25%	0.25	\$	12,055	\$ 12,055	\$	24,110
14	Clinical Case Manager	\$	51,981	1.00	50%	0.50	\$	25,991	\$ 25,991	\$	51,981
15											
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30	TOTALS			2.00	75%	0.75	\$	38,046	\$ 38,046	\$	76,091
31			000/	1							
	FRINGE BENEFIT RATE		28%								
33	EMPLOYEE FRINGE BENEFITS						\$	10,680	\$ 10,680	\$	21,359
34 35											
	TOTAL SALARIES & BENEFITS						\$	48,725	\$ 48,725	\$	97,450
	HSA #2									-	5/25/2017

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2							Date	: 5/25/17		
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6 7				One	aratin	g Exper		tail		
8				Opt	siatin	g Lypen		lan		
9										
10										
11										FOTAL
12	Expenditure C	ategory	1	FERM	7/1/1	7-6/30/18	7/1/	18-6/30/19	7/1/	17-6/30/19
13	Rental of Prop	perty								
14	Utilities(Elec,	Water, Gas, Pł	none, Scaveng	er)						
15	Office Supplie	s, Postage			\$	2,463	\$	2,463	\$	4,926
16	Building Maint	enance Suppli	es and Repair							
17	Printing and R	eproduction								
18	Insurance				\$	244	\$	244	\$	488
19	Staff Training									
20	Staff Travel-(L	ocal & Out of 1	ōwn)		\$	250	\$	250	\$	500
21	Rental of Equi	pment								
-	CONSULTANT/S	UBCONTRACTOR	DESCRIPTIVE T	ITLE						
23				-						
24				-						
25 26				-			·			
	OTHER			-						
	Payroll Expension	ses			\$	386	\$	386	\$	772
	Audit/Account			-	\$	211	\$	211	\$	422
	Office Equipm		Support)	-			<u>.</u>			
	IT & Small Off			-	\$	795	\$	795	\$	1,590
32		I Activities (sta	ff)	_	\$	183	\$	183	\$	366
33	Tenant Projec	ts/Activities		_	\$	4,500	\$	4,500	\$	9,000
34				_						
35	TOTAL OPER	ATING EXPEN	ISE		\$	9,032	\$	9,032	\$	18,064
36										
37	HSA #3									5/25/2017

APPENDIX A – SERVICES TO BE PROVIDED GLIDE COMMUNITY HOUSING

RAD Housing Support Services at 350 Ellis Street July 1, 2017 to June 30, 2019

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services, a division of the Human Services Agency
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that results in substantial functional limitations in one or more major life activity.
Grantee	Glide Community Housing
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units at 350 Ellis Street.

IV. Description of Services

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities

- Build tenant base
- Develop neighborhood partnerships
- 2) Community Building
 - Facilitate community organizing and host events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase access to information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities
- 3) Service Connection
 - Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will hire, train, and supervise 1.25 FTE (leveraged and/or grant funded) to provide services at 350 Ellis Street during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.

Health and Wellness:

- Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.
- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.

Housing Stability:

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.

Community Engagement:

• Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.

V. Location and Time of Services

Services will be provided at 350 Ellis Street, Monday through Friday, during regular office hours of 9 a.m. to 5 p.m., excluding holidays. A designated staff person is also on call for after hours and weekend emergencies.

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.
- Grantee will communicate and collaborate regularly with DAAS to help provide logistical and operational support to the program and to provide quality services to tenants.
- Grantee will work collaboratively with DAAS to strategize program direction and services provision.
- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
- Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, and provide documentation that tracks demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Grantee will have individual and group service encounters with at least 50% of the tenants per month.
- Grantee will provide to tenants a minimum of one (1) activity or event per week (or 52 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel "strongly" or "very strongly" about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: "How strongly do you feel about being connected and involved in the tenant/resident community at [site]? The options should be "Very strongly", "Strongly", "Somewhat", "Not at all".
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will "agree" or "highly agree" that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: "Do you have better access to services that improve your health and wellness?" The options should be "Highly agree", "Agree", "Neutral", "Disagree", "Highly disagree".
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII - Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
 - Number and percentage of unduplicated tenants with individual and group service encounters.
 - Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
 - Number and percentage of tenants who have rated overall service as "Excellent" or "Good" in Tenant Satisfaction Survey, and number and percentage of response rate.
 - Number and percentage of unduplicated tenants who were outreached to.
 - Number and percentage of households that have maintained or have obtained stable housing.
- C. Grantee will provide Ad Hoc reports as required by the Department.

D. For assistance with reporting requirements or submission of reports, contact:

Victoria.Chan@sfgov.org Contract Manager, Office of Contract Management Human Services Agency

or

Carrie.Wong@sfgov.org Director, Long Term Care Operations Department of Aging and Adult Services

X. Monitoring Activities

- A. <u>Program Monitoring</u>: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.
- B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	В	С	D
1	A	Б	-	Appendix B, Page 1
2				ent Date: 5/12/2017
3	HUMAN SERVICES AGENCY			
4	HOMAN SERVICES AGENCI	BY PROGRA		
	2	DIFROGRA		-
5	Contractor's Name		Contrac	t Term
6	Glide Community Housing		July 1, 2017-Ju	une 30, 2019
7	(Check One) NewX Renewal _	Modification		
8	If modification, Effective Date of Mod.	lo of Mod		
<u> </u>				
9	Program: 350 Ellis - Rental Assistance Demons	tration		TOTAL
10	Budget Reference Page No.(s)			
	Program Term	7/1/17 - 6/30/18	7/1/18 - 6/30/19	7/1/17 - 6/30/19
12	Human Services Agency Expenditures			
13	Salaries & Benefits	\$48,094	\$48,094	\$96,188
	Operating Expense	\$9,801	\$9,801	\$19,602
15	Capital Expenditure	\$0	\$0	\$0
	Subtotal	\$57,895	\$57,895	\$115,790
	Indirect Percentage (%)	13%	13%	13%
	Indirect Cost (Line 16 X Line 17)	\$7,526	\$7,526	\$15,052
-	Total HSA Expenditures	\$65,421	\$65,421	\$130,842
20	Developer Match Expenditures			
-	Salaries & Benefits	\$69,016	\$69,016	\$138,032
	Operating Expense	\$2,666	\$2,666	\$5,332
	Capital Expenditure	\$0	\$0	\$0
	Subtotal	\$71,682	\$71,682	\$143,364
_	Indirect Percentage (%)	13%	13%	13%
	Indirect Cost (Line 16 X Line 17)	\$9,318	\$9,318	\$18,636
	Total Developer Expenditures	\$81,000	\$81,000	\$162,000
28 29	Total USA and Davalanar Expanditures	\$146,421	\$146,421	\$292,842
	Total HSA and Developer Expenditures HSA Revenues	\$140,421	\$140,421	əz92,042
30		CC 404	<u><u></u></u><u></u><u></u>	¢400.040
31	Local General Fund	\$65,421	\$65,421	\$130,842
33				
34				
35				
36				
37				
38				
39	TOTAL HSA REVENUES	\$65,421	\$65,421	\$130,842
40	Developer Revenues			
	Developer Match Funds	\$81,000	\$81,000	\$162,000
42		<u> </u>		
43 44		┨─────┤		
44	Total Developer Revenues	\$81,000	\$81,000	\$162,000
	Total Revenues	\$146,421	\$146,421	\$292,842
	Full Time Equivalent (FTE)	1.75	1.75	÷=0=,0+2
		•		4-6107
	Prepared by: Pamela Grayson-Holmon		Telephone No. 415-67	4-010 <i>1</i>
	HSA-CO Review Signature:			
	HSA #1			
52				

	A	В	С	D	E	F				
1		0	Ű	5		Appendix B, Page 2				
2					Docum	nent Date: 5/12/2017				
4	Contractor's Name: Glide Community Hou	using - 350 E	Ellis (RAD)							
5										
6										
7	Salaries & Benefits Detail									
8										
9		Human	Services	Human	Services					
10			ency		ency	TOTAL				
11	TERM		- 6/30/18		- 6/30/19	7/1/17 - 6/30/19				
12	POSITION TITLE	FTE	SALARIES	FTE	SALARIES					
13	Support Services Case Manager- Lead	0.30	\$15,151	0.30	\$15,151	\$30,302				
14	Executive Director	0.05	5,674	0.05	5,674	\$11,348				
15	Operations Manager	0.05	3,467	0.05	3,467	\$6,934				
16	Case Manager (Spanish Speaker)	0.10	2,185	0.10	2,185	\$4,370				
17	Admin Asst	0.30	9,728	0.30	9,728	\$19,456				
	Project Manager	0.05	1,664	0.05	1,664	\$3,328				
19			,		,	· · · · ·				
20										
20										
22										
23	TOTALS	0.85	\$37,869	0.85	\$37,869	\$75,738				
24 25										
	EMPLOYEE FRINGE BENEFITS	27%	¢10.225	27%	¢10.225	\$20.450				
20 27	EMPLOTEE FRINGE BENEFITS	21%	\$10,225	21%	\$10,225	\$20,450				
28										
29	TOTAL HSA SALARIES & BENEFITS		\$48,094		\$48,094	\$96,188				
30										
31	DEVELOPER MATCH POSITION TITLE									
32	Support Services Case Manager Lead	0.50	\$25,251	0.50	\$25,251	\$50,502				
33	Clincial Director/Supervisor	0.20	\$14,988	0.20	\$14,988	\$29,976				
34	Project Manager	0.05	\$1,664	0.05	\$1,664	\$3,328				
35	Executive Director	0.10	\$11,347	0.10	\$11,347	\$22,695				
36	Case Manager	0.05	\$1,093	0.05	\$1,093	\$2,185				
37										
38	TOTALS	0.90	\$54,343	0.90	\$54,343	\$108,686				
39		0.00	40 1,0 10	0.00	<i>40 1,0 10</i>	\$100,000				
	EMPLOYEE FRINGE BENEFITS	27%	\$14,673	27%	\$14,673	\$29,346				
41		2170	φ11,070	_1 /0	ψι 1,070	<i>\</i> <u></u> <i>\</i> <i>\</i> <i>\</i> <i>\</i> <i>\</i> <i>\</i> <i>\</i> <i>\</i>				
	TOTAL DEVELOPER SALARIES & BENE	FITS	\$69,016		¢60.046	¢120.020				
42 43	I UTAL DEVELOPER SALARIES & BENE	F113	\$09,010 \$		\$69,016	\$138,032				
	TOTAL SALARIES & BENEFITS	1.75	\$117,110	1.75	\$117,110	\$234,220				
45	-			-						
46	HSA #2									
47										

	A B C	D	E	F	G	Н
1				-	Dee	Appendix B, Page 3
2					Doc	ument Date: 5/12/2017
4	Contractor's Name: Glide Community Housing	- 350 El	llis (RAD)			
5 6						
7		Ope	rating Expense	Deta	il	
8		г				
9			Human Services Agency	- F	luman Services Agency	TOTAL
10		L	Ageney		Ageney	
11	HSA Expenditure Category	TERM	7/1/17 - 6/30/18		7/1/18 - 6/30/19	7/1/17 - 6/30/19
12	Rental of Property	_				
13	Utilities (Elec, Water, Gas, Phone, Scavenger)	-	\$1,000		\$1,000	\$2,000
14	Office Supplies, Postage	_	\$2,006		\$2,006	\$4,012
15	Building Maintenance Supplies and Repair					
16	Printing and Reproduction	-				
	Insurance	-				
	Staff Training	-	\$300		\$300	\$600
	Staff Travel-(Local & Out of Town)	-	\$300		\$300	
	Rental of Equipment	-	<u> </u>		ψουσ	
20		-				
22						
23	OTHER					
	Resident Activities		\$5,195		\$5,195	
25	Consultants/Subcontractors-IT Services		\$1,000		\$1,000	\$2,000
26 27						
28	TOTAL HSA OPERATING EXPENSE		\$9,801		\$9,801	\$19,602
29		-	φ0,001		φ0,001	φ10,002
	Developer Match Operating Expense					
	Rental of Property	-				
	Utilities(Elec, Water, Gas, Phone, Scavenger)	-				
	Office Supplies, Postage	-				
	Building Maintenance Supplies and Repair	-				
	Printing and Reproduction	-				
	Insurance	-				
37	Staff Training	-				
38	Staff Travel-(Local & Out of Town)	-				
39	Rental of Equipment	-				
40						
41	OTHER Desident Activities		#0 000		#0 000	AE 000
42 43	Resident Activities		\$2,666		\$2,666	\$5,332
44			* ••••=		* •• • • •	
45 46	TOTAL DEVELOPER OPERATING EXPENSE	-	\$2,666		\$2,666	\$5,332
47						
48 49	TOTAL OPERATING EXPENSE	-	\$12,467		\$12,467	\$24,934
	HSA #3			<u>.</u>		
51						

Document Date: 5/12/2017 Contractor's Name: Glide Community Housing - 350 Ellis (RAD) (Same as Line 6 on HSA #1) Indirect Cost Detail Human Services **Human Services** 1. Salaries and Benefits Agency Agency TERM 7/1/17 - 6/30/18 7/1/18 - 6/30/19 TOTAL **Position Title** FTE SALARIES FTE SALARIES FTE SALARIES EMPLOYEE FRINGE BENEFITS % % TOTAL SALARIES & BENEFITS 2. Operating Cost - HSA TOTAL Expenditure Category 7/1/17 - 6/30/18 7/1/18 - 6/30/19 **HSA Indirect Cost** Back Office Support (ADP Total Source) \$7,000 \$3,500 \$3,500 Audit \$4,000 \$2,000 \$2,000 Insurance/accounting support \$4,052 \$2,026 \$2,026 Total HSA Indirect Cost \$7,526 \$15,052 \$7,526 Developer Indirect Cost ADP Total Source \$3,500 \$3,500 \$7,000 Audit \$2,500 \$5,000 \$2,500 Insurance/Accounting Support \$2,400 \$2,400 \$4,800 Furniture, fixtures, and office set-up supplies \$918 \$918 \$1,836 Total Developer Indirect Cost \$18,636 \$9,318 \$9,318 TOTAL OPERATING INDIRECT COST \$16,844 \$16,844 \$33,688 \$ HSA# 5

Appendix B, Page 4

APPENDIX A-1 – SERVICES TO BE PROVIDED MERCY HOUSING CALIFORNIA

RAD Housing Support Services at 345 Arguello Boulevard July 1, 2017 to June 30, 2019

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services, a division of the Human Services Agency
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that results in substantial functional limitations in one or more major life activity.
Grantee	Mercy Housing
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units at 345 Arguello Boulevard.

IV. Description of Services

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities

- Build tenant base
- Develop neighborhood partnerships
- 2) Community Building
 - Community organizing and events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities
- 3) Service Connection
 - Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will hire, train, and supervise 1 FTE (leveraged and/or grant funded) to provide services at 345 Arguello Boulevard during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.

Health and Wellness:

- Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.
- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.

Housing Stability:

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.

Community Engagement:

• Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.

V. Location and Time of Services

Services will be provided at 345 Arguello Boulevard, Monday through Friday during regular office hours of 9 a.m. to 5 p.m., excluding holidays.

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.
- Grantee will communicate and collaborate regularly with DAAS to help provide logistical and operational support to the program and to provide quality services to tenants.
- Grantee will work collaboratively with DAAS to strategize program direction and services provision.
- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
- Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, and provide documentation that tracks demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Grantee will have individual and group service encounters with at least 65% of the tenants per month.
- Grantee will provide to tenants a minimum of two (2) activities or events per week (or 104 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel "strongly" or "very strongly" about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: "How strongly do you feel about being connected and involved in the tenant/resident community at [site]? The options should be "Very strongly", "Strongly", "Somewhat", "Not at all".
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will "agree" or "highly agree" that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: "Do you have better access to services that improve your health and wellness?" The options should be "Highly agree", "Agree", "Neutral", "Disagree", "Highly disagree".
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII - Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
 - Number and percentage of unduplicated tenants with individual and group service encounters.
 - Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
 - Number and percentage of tenants who have rated overall service as "Excellent" or "Good" in Tenant Satisfaction Survey, and number and percentage of response rate.
 - Number and percentage of unduplicated tenants who were outreached to.
 - Number and percentage of households that have maintained or have obtained stable housing.
- C. Grantee will provide Ad Hoc reports as required by the Department.

D. For assistance with reporting requirements or submission of reports, contact:

Victoria.Chan@sfgov.org Contract Manager, Office of Contract Management Human Services Agency

or

Carrie.Wong@sfgov.org Director, Long Term Care Operations Department of Aging and Adult Services

X. Monitoring Activities

- A. <u>Program Monitoring</u>: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.
- B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	В	С	D
1			-	ppendix B-1, Page 1
2				nent Date: 4/25/2017
3	HUMAN SERVICES AGENCY	CONTRACT BUD	GET SUMMARY	
4		BY PROGRAI		
<u> </u>	Constructional Name	DITROCKA		• Т
5	Contractor's Name		Contrac	tierm
6	Mercy Housing: 345 Arguello		July 1, 2017-J	une 30, 2019
7	(Check One) NewX_ Renewal	Modification		
8	If modification, Effective Date of Mod.	lo. of Mod.		
–				
9	Program: Rental Assistance Demonstration			TOTAL
10	Budget Reference Page No.(s)			
	Program Term	7/1/17-6/30/18	7/1/18-6/30/19	7/1/17-6/30/19
12	Human Services Agency Expenditures	771717-0/30/10	771/10-0/30/19	7/1/17-0/30/19
13	Salaries & Benefits	\$0	\$0	\$0
-	Operating Expense	\$30,254	\$30,254	\$60,508
15	Capital Expenditure	\$0	\$0	\$0
16	Subtotal	\$30,254	\$30,254	\$60,508
17	Indirect Percentage (%)	13%	13%	13%
18	Indirect Cost (Line 16 X Line 17)	\$3,933	\$3,933	\$7,866
19	Total HSA Expenditures	\$34,187	\$34,187	\$68,374
20	Developer Match Expenditures			
21	Salaries & Benefits	\$81,000	\$81,000	\$162,000
22	Operating Expense	\$0	\$0	\$0
23	Capital Expenditure	\$0	\$0	\$0
24	Total Developer Expenditures	\$81,000	\$81,000	\$162,000
25				
	Total HSA and Developer Expenditures	\$115,187	\$115,187	\$230,374
27	HSA Revenues			
	Local General Fund	\$34,187	\$34,187	\$68,374
29				
30				
31 32				
33				
34				
35				
36	TOTAL HSA REVENUES	\$34,187	\$34,187	\$68,374
37	Developer Revenues	,	,	·
38	Developer Match Funds	\$81,000	\$81,000	\$162,000
39				
40				
41		04 000	#04 000	# 400.000
42	Total Developer Revenues	\$81,000	\$81,000	\$162,000
43				
44	Total Revenues	\$115,187	\$115,187	\$230,374
45	Full Time Equivalent (FTE)	2.50	2.50	
47	Prepared by: Samantha Hogg	•	Felephone No.	
48	HSA-CO Review Signature:			
49	HSA #1			
50				

	A	В	С	D	E	F
1						ppendix B-1, Page 2
2 3					Docum	nent Date: 4/25/2017
4	Mercy Housing: 345 Arguello					
5						
6						
7			Salaries &	& Benefi	ts Detail	
8						
9		Human	Services	Huma	n Services	
10			ency		gency	TOTAL
11	TERM		-6/30/18		8-6/30/19	7/1/17-6/30/19
12	POSITION TITLE	FTE	SALARIES	FTE	SALARIES	
13						
14						
15						
16						
17						
18						
19						
20						
21						
22						
23	TOTALS					
24						
25						
26 27	EMPLOYEE FRINGE BENEFITS					
28						
29	TOTAL HSA SALARIES & BENEFITS		\$0		\$0	\$0
30						
31	DEVELOPER MATCH POSITION TITLE					
32	Resident Services	1.00	\$63,281	1.00	\$63,281	\$126,562
33			-			
34						
35						
36						
37						
38	TOTALS	1.00	\$63,281	1.00	\$63,281	\$126,562
39	-		,,		,, <u>.</u>	Ţ · , - 0 _
40	EMPLOYEE FRINGE BENEFITS	28%	\$17,719	28%	\$17,719	\$35,438
41		2070	ψ11,1 IO	2070	ψ. τ , τ τΟ	φ00, - 00
42	TOTAL DEVELOPER SALARIES & BENE	FITS	\$81,000		\$81,000	\$162,000
43	TOTAL SALARIES & BENEFITS	1.00	\$81,000	1.00	\$81,000	\$162,000
44			,,			,,,,,
45	HSA #2					
46						

	A	В	С	D	E	F	G	н	1
1		U	Ű		L	1.1		Appe	endix B-1, Page 3
2							D	ocumen	t Date: 4/25/2017
4	Mercy Housing: 345 A	rguello							
5 6									
7				Оре	rating Expense	e Deta	ail		
8									
9					Human Services Agency		luman Service Agency	s	TOTAL
10	HSA Expenditure Cate	egory		TERM			7/1/18-6/30/19		7/1/17 - 6/30/19
11	Rental of Property								
12	Telephone								
13	Office Supplies, Posta	ige			2,000)	200	00	4,000
14	Maintenance Supplies	and Repair							
15	Printing and Reproduc	tion							
16	Insurance								
17	Staff Travel (local) &T	raining			1,900)	1,90	0	3,800
18	Law Library					_			
	Membership/Dues								
20	Rental of Equipment								
	Senior Right Bulletin								
22	3								
23				_					
24	071150								
	OTHER Supervision				8,960)	8,96	0	17,920
	Supplies for Monthly C				17,394		17,39		34,788
28	Events. Including, but Wellness programs, E			1					
29 30	Food & Beverages.		onopo,						
			-				¢20.00		¢c0 500
31	TOTAL HSA OPERAT		E		\$30,254	4	\$30,25		\$60,508
32	Developer Metals One								
	Developer Match Oper	raung Expense							
	Rental of Property								
	Telephone								
	Office Supplies, Posta	-							
	Printing and Reproduc	tion							
	Insurance								
	Law Library								
	Membership/Dues								
	Rental of Equipment								
	Volunteer Expenses (F	Receptionist/int	ake)						
	Client Costs								
	Maintenance Supplies	and Repair							
	Utilities								
	Janitorial service & su	pplies							
47									
48 49	TOTAL DEVELOPER	OPERATING I	EXPENSE		\$0	0		<u> </u>	\$0
	TOTAL OPERATING	EXPENSE			\$30,254	4	\$30,25	54	\$60,508
51							\$00,EC		÷ 30,000
52 53	HSA #3								

Appendix B-1, Page 4 Document Date: 4/25/2017

Mercy Housing: 345 Arguello (Same as Line 6 on HSA #1)										
Indirect Cost Detail										
1. Salaries and Benefits TERM			Human Services Agency 7/1/17-6/30/18		Human Services Agency 7/1/18-6/30/19	TOTAL				
Position Title	T	FTE	SALARIES	FTE	SALARIES	SALARIE	S			
							—			
							_			
EMPLOYEE FRINGE BENEFITS		%		%						
TOTAL SALARIES & BENEFITS										
2. Operating Cost										
Expenditure Category										
Q/A Fee i.e Contract Administrator et	<u>c</u> .		\$3,933		\$3,933	\$7,8	66			
	_									
	_									
	_									
	-									
	-									
	-									
	_									
	_									
TOTAL OPERATING COST			\$3,933		\$3,933	\$7,8	66			
TOTAL INDIRECT COST			\$3,933		\$3,933	\$7,8	86			
(Salaries & Benefits + Operating Cos	t)		ψ0,900		ψ0,900	φι,Ο	00			
HSA# 5										

APPENDIX A-2 – SERVICES TO BE PROVIDED MERCY HOUSING CALIFORNIA

RAD Housing Support Services at 491 31st Avenue July 1, 2017 to June 30, 2019

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services, a division of the Human Services Agency
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that results in substantial functional limitations in one or more major life activity.
Grantee	Mercy Housing
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units at 491-31st Avenue.

IV. Description of Services

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities

- Build tenant base
- Develop neighborhood partnerships
- 2) Community Building
 - Community organizing and events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities
- 3) Service Connection
 - Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will hire, train, and supervise 1 FTE (leveraged and/or grant funded) to provide services at 491-31st Avenue during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.

Health and Wellness:

- Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.
- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.

Housing Stability:

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.

Community Engagement:

• Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.

V. Location and Time of Services

Services will be provided at 491-31st Avenue, Monday through Friday during regular office hours of 9 a.m. to 5p.m., excluding holidays.

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.
- Grantee will communicate and collaborate regularly with DAAS to help provide logistical and operational support to the program and to provide quality services to tenants.
- Grantee will work collaboratively with DAAS to strategize program direction and services provision.
- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
- Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, and provide documentation that tracks demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Grantee will have individual and group service encounters with at least 65% of the tenants per month.
- Grantee will provide to tenants a minimum of two (2) activities or events per week (or 104 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel "strongly" or "very strongly" about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: "How strongly do you feel about being connected and involved in the tenant/resident community at [site]? The options should be "Very strongly", "Strongly", "Somewhat", "Not at all".
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will "agree" or "highly agree" that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: "Do you have better access to services that improve your health and wellness?" The options should be "Highly agree", "Agree", "Neutral", "Disagree", "Highly disagree".
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII - Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
 - Number and percentage of unduplicated tenants with individual and group service encounters.
 - Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
 - Number and percentage of tenants who have rated overall service as "Excellent" or "Good" in Tenant Satisfaction Survey, and number and percentage of response rate.
 - Number and percentage of unduplicated tenants who were outreached to.
 - Number and percentage of households that have maintained or have obtained stable housing.
- C. Grantee will provide Ad Hoc reports as required by the Department.
- D. For assistance with reporting requirements or submission of reports, contact:

Victoria.Chan@sfgov.org Contract Manager, Office of Contract Management Human Services Agency

or

Carrie.Wong@sfgov.org Director, Long Term Care Operations Department of Aging and Adult Services

X. Monitoring Activities

- A. <u>Program Monitoring</u>: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.
- B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	В	С	D					
1			A	ppendix B-2, Page 1					
2	Document Date: 4/25/2017								
3	HUMAN SERVICES AGENCY	CONTRACT BUD	GET SUMMARY						
4									
5	Contractor's Name Contract Term								
6	Mercy Housing : 31st Avenue July 1, 2017 - June 30, 2019								
7	(Check One) NewX Renewal Modification								
	· · · · — — — —	<u> </u>							
8	If modification, Effective Date of Mod.	lo. of Mod.							
9	Program: Rental Assistance Demonstration			TOTAL					
10	Budget Reference Page No.(s)								
11	Program Term	7/1/17-6/30/18	7/1/18-6/30/19	7/1/17-6/30/19					
12	Human Services Agency Expenditures								
	Salaries & Benefits	\$0	\$0	\$0					
	Operating Expense	\$31,581	\$31,581	\$63,162					
	Capital Expenditure	\$0	\$0	\$0					
	Subtotal	\$31,581	\$31,581	\$63,162					
	Indirect Percentage (%)	13%	13%	13%					
	Indirect Cost (Line 16 X Line 17)	\$4,106	\$4,106	\$8,212					
19		\$35,687	\$35,687	\$71,374					
20	Developer Match Expenditures	* • (• • •	* •••••••	* (* * * * * * * * * * * * * * * * *					
21	Salaries & Benefits	\$81,000	\$81,000	\$162,000					
	Operating Expense	\$0	\$0	\$0					
23		\$0	\$0	\$0					
24 25	Total Developer Expenditures	\$81,000	\$81,000	\$162,000					
25	Total HSA and Developer Expenditures	\$116,687	\$116,687	\$233,374					
20	HSA Revenues	φ110,007	φ110,007	φ200,074					
28		\$35,687	\$35,687	\$71,374					
20		φ 3 3,007	\$JJ,007	φ/1,3/4					
30									
31									
32									
33									
34	TOTAL HSA REVENUES	\$35,687	\$35,687	\$71,374					
35	Developer Revenues								
36	Developer Match Funds	\$81,000	\$81,000	\$162,000					
37									
38									
39 40	Total Developer Revenues	\$81,000	\$81,000	\$162,000					
41	Total Revenues	\$116,687	\$116,687	\$233,374					
42	Full Time Equivalent (FTE)	1.00	1.00						
44	Prepared by: Samantha Hogg		Telephone No. (415) 3	355-7120					
45	HSA-CO Review Signature:								
	HSA #1								
47									

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1	Α	В	С	D	E A	F ppendix B-2, Page 2			
2	Document Date: 4/25/2017								
3									
4 5	Mercy Housing : 31st Avenue								
6									
7			Salaries &	& Benefi	ts Detail				
8									
9									
10	Human Services Human Services Agency Agency TOTAL								
10 11	TERM		-6/30/18		gency 8-6/30/19	TOTAL 7/1/17-6/30/19			
12	POSITION TITLE	FTE	SALARIES	FTE	SALARIES				
13	Resident Services Coordinator								
14									
15									
16									
17 18									
19									
20									
21									
22									
23	TOTALS								
24		ļ	ļ	ļ		·			
25									
	EMPLOYEE FRINGE BENEFITS								
27 28									
29	TOTAL HSA SALARIES & BENEFITS		\$0		\$0	\$0			
30			ψυ	Į	ψυ	φυ			
	DEVELOPER MATCH								
32	POSITION TITLE								
	Resident Services Coorindator	1.00	\$63,281	1.00	\$63,281	\$126,562			
34		1.00	ψ00,201	1.00	ψ00,201	φ120,302			
35									
36									
37									
38									
39	TOTALS	1.00	\$63,281	1.00	\$63,281	\$126,562			
40			. ,		,	,			
41	EMPLOYEE FRINGE BENEFITS	28%	\$17,719	28%	\$17,719	\$35,438			
42									
43	TOTAL DEVELOPER SALARIES & BENE	FITS	\$81,000		\$81,000	\$162,000			
44	TOTAL SALARIES & BENEFITS	1.00	\$81,000	1.00	\$81,000	\$162,000			
45									
46 47	HSA #2								

	A	В	С	D	E	F	G	н	
1						1		Appe	ndix B-2, Page 3
2							Do		Date: 4/25/2017
3 4	Mercy Housing : 31st /	Avenue							
5	_ 0								
6 7				One	rating Expense	٦œ	tail		
8				Oper		De	lan		
				ĺ	Human Services	ן ר	Human Services	1 [
9					Agency		Agency		TOTAL
	HSA Expenditure Cate	egory		TERM	7/1/17-6/30/18		7/1/18-6/30/19		/1/17-6/30/19
	Rental of Property			-					
	Telephone	a 0		-	1 751		1 751		2 502
	Office Supplies, Posta Maintenance Supplies	-		-	1,751		1,751		3,502
	Printing and Reproduc	-		-					
	Insurance	1011		-					
	Staff Travel (local) &T	roining		-	1 500		1 500		3 000
	Law Library	raining		-	1,500		1,500		3,000
	Membership/Dues			-					
	Rental of Equipment			-					
20	Senior Right Bulletin			-					
21				-					
22									
23									
	OTHER								
25 26	Supplies for Monthly C	Community Pro	jects & Eve	ents. (li	18,750		18,750		37,500
27	Supervision	,			9,580		9,580		19,160
28									
29 30									
			_		* •• - - ·		Ac		\$ \$\$\$ 1 5-
31	TOTAL HSA OPERAT	ING EXPENSI	=	-	\$31,581		\$31,581		\$63,162
32									
33	Developer Match Oper	rating Expense	<u>)</u>						
34	Rental of Property			-					
35	Telephone			-					
36	Office Supplies, Posta	ge		-					
37	Printing and Reproduc	tion				_		_	
	Insurance			-		-			
	Law Library			-					
	Membership/Dues			-					
	•			-					
	Rental of Equipment	Dependierstet		-					
	Volunteer Expenses (F	<eceptionist in<="" td=""><td>аке)</td><td>-</td><td></td><td></td><td></td><td></td><td></td></eceptionist>	аке)	-					
43	Client Costs			-					
	Maintenance Supplies	and Repair		-					
45	Utilities			-					
46	Janitorial service & su	pplies		-					
47									
	TOTAL DEVELOPER	OPERATING I	EXPENSE	-	\$0		\$0		\$0
49 50	TOTAL OPERATING E				\$31,581		\$31,581		\$63,162
51				-	φ31,301		φ31,301		ψ03,102
52	HSA #3								
53									
Appendix B-2, Page 4 Document Date: 4/25/2017 Mercy Housing : 31st Avenue (Same as Line 6 on HSA #1) **Indirect Cost Detail Human Services** Human Services 1. Salaries and Benefits Agency Agency TOTAL TERM 7/1/17-6/30/18 7/1/18-6/30/19 7/1/17-6/30/19 **Position Title** FTE SALARIES FTE SALARIES SALARIES EMPLOYEE FRINGE BENEFITS % % TOTAL SALARIES & BENEFITS 2. Operating Cost Expenditure Category Q/A Fee i.e Contract Administrator, etc. \$4,106 \$4,106 \$8,212 TOTAL OPERATING COST \$4,106 \$4,106 \$8,212 TOTAL INDIRECT COST \$4,106 \$4,106 \$8,212 (Salaries & Benefits + Operating Cost) HSA# 5

APPENDIX A-3 – SERVICES TO BE PROVIDED MERCY HOUSING CALIFORNIA

RAD Housing Support Services at 1880 Pine Street July 1, 2017 to June 30, 2019

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services, a division of the Human Services Agency
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that results in substantial functional limitations in one or more major life activity.
Grantee	Mercy Housing
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units at 1880 Pine Street.

IV. Description of Services

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities

- Build tenant base
- Develop neighborhood partnerships
- 2) Community Building
 - Community organizing and events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities
- 3) Service Connection
 - Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will hire, train, and supervise 1.5 FTE (leveraged and/or grant funded) to provide services at 1880 Pine Street during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.

Health and Wellness:

- Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.
- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.

Housing Stability:

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.

Community Engagement:

• Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.

V. Location and Time of Services

Services will be provided at 1880 Pine Street, Monday through Friday during regular office hours of 9 a.m. to 5p.m., excluding holidays.

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.
- Grantee will communicate and collaborate regularly with DAAS to help provide logistical and operational support to the program and to provide quality services to tenants.
- Grantee will work collaboratively with DAAS to strategize program direction and services provision.
- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
- Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, and provide documentation that tracks demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Grantee will have individual and group service encounters with at least 65% of the tenants per month.
- Grantee will provide to tenants a minimum of two (2) activities or events per week (or 104 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel "strongly" or "very strongly" about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: "How strongly do you feel about being connected and involved in the tenant/resident community at [site]? The options should be "Very strongly", "Strongly", "Somewhat", "Not at all".
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will "agree" or "highly agree" that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: "Do you have better access to services that improve your health and wellness?" The options should be "Highly agree", "Agree", "Neutral", "Disagree", "Highly disagree".
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII - Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
 - Number and percentage of unduplicated tenants with individual and group service encounters.
 - Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
 - Number and percentage of tenants who have rated overall service as "Excellent" or "Good" in Tenant Satisfaction Survey, and number and percentage of response rate.
 - Number and percentage of unduplicated tenants who were outreached to.
 - Number and percentage of households that have maintained or have obtained a stable housing.
- C. Grantee will provide Ad Hoc reports as required by the Department.
- D. For assistance with reporting requirements or submission of reports, contact:

Victoria.Chan@sfgov.org Contract Manager, Office of Contract Management Human Services Agency

or

Carrie.Wong@sfgov.org Director, Long Term Care Operations Department of Aging and Adult Services

X. Monitoring Activities

- A. <u>Program Monitoring</u>: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.
- B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	В	С	D
1			-	pendix B-3, Page 1
2			Docume	nt Date: 04/25/2017
3	HUMAN SERVICES AGENCY	CONTRACT BUD	GET SUMMARY	
4		BY PROGRA		
5	Contractor's Name		Contrac	t Term
6	Mercy Housing 1880 Pine Street		July 1, 2017 -J	une 30 2019
7		Modification	041 9 1, 2017 0	
	,			
8	If modification, Effective Date of Mod.	lo. of Mod.		
9	Program: Rental Assistance Demonstration			TOTAL
10	Budget Reference Page No.(s)			
	Program Term	07/1/17-6/30/18	7/1/18-6/30/19	07/1/17-6/30/19
12	Human Services Agency Expenditures		.,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	
13	Salaries & Benefits	\$40,500	\$40,500	\$81,000
	Operating Expense	\$42,824	\$42,824	\$85,648
	Capital Expenditure	\$0	\$0	\$0
_	Subtotal	\$83,324	\$83,324	\$166,648
17	Indirect Percentage (%)	13%	13%	13%
18	Indirect Cost (Line 16 X Line 17)	\$10,832	\$10,832	\$21,664
19	Total HSA Expenditures	\$94,156	\$94,156	\$188,312
20	Developer Match Expenditures			
21	Salaries & Benefits	\$81,000	\$81,000	\$162,000
_	Operating Expense	\$0	\$0	\$0
23	Capital Expenditure	\$0	\$0	\$0
24	Total Developer Expenditures	\$81,000	\$81,000	\$162,000
25		• • • • • • •	• · ·	.
	Total HSA and Developer Expenditures	\$175,156	\$175,156	\$350,312
27	HSA Revenues			
	Local General Fund	\$94,156	\$94,156	\$188,312
29				
30 31				
32				
33				
34				
35				
36	TOTAL HSA REVENUES	\$94,156	\$94,156	\$188,312
37	Developer Revenues			
38	Developer Match Funds	\$81,000	\$81,000	\$162,000
39				
40				
41	Total Davalanar Davanuss	¢04.000	¢04.000	¢400.000
42	Total Developer Revenues	\$81,000	\$81,000	\$162,000
43	Total Revenues	\$175,156	\$175,156	\$350,312
44	Full Time Equivalent (FTE)	1.50	1.50	
46	Prepared by: Samantha Hogg		Telephone No. (415) 3	55.7120
47	HSA-CO Review Signature:			
48	HSA #1			
49				
<u> </u>				

	A	В	С	D	E	F
1						opendix B-3, Page 2
2 3					Docume	nt Date: 04/25/2017
4	Mercy Housing 1880 Pine Street					
5						
6						
7			Salaries &	& Benefi	ts Detail	
8						
9		Human	Services	Humai	n Services	
10			ency		gency	TOTAL
11	TERM		7-6/30/18		8-6/30/19	07/1/17-6/30/19
12	POSITION TITLE	FTE	SALARIES	FTE	SALARIES	
13	Resident Services Coordinator	0.50	\$31,640	0.50	\$31,640	\$63,280
14						
15						
16						
17						
18						
19						
20						
21						
22						
23	TOTALS	0.50	\$31,640	0.50	\$31,640	\$63,280
24 25						
26	EMPLOYEE FRINGE BENEFITS	28%	\$8,860	28%	\$8,860	\$17,720
27			+0,000		+ = , = = =	···,·=·
28						
29	TOTAL HSA SALARIES & BENEFITS		\$40,500		\$40,500	\$81,000
30						
31	DEVELOPER MATCH POSITION TITLE					
32	Resident Services Coorindator	1.00	\$63,281	1.00	\$63,281	\$126,562
33						
34						
35						
36						
37						
38	TOTALS	1.00	\$63,821	1.00	\$63,281	\$126,562
39			,		,	* -,
40	EMPLOYEE FRINGE BENEFITS	28%	\$17,719	28%	\$17,719	\$35,438
41		2070	ψ17,710	2070	ψ. τ ,τ το	φ00, 1 00
41	TOTAL DEVELOPER SALARIES & BENE	FITS	\$81,000		\$81,000	\$162,000
	TOTAL DEVELOPER SALARIES & BENE	1.50		1.50		
43	IVIAL SALARIES & DEINEFIIS	1.50	\$121,500	1.50	\$121,500	\$243,000
44 45	HSA #2					
46						

	A	В	С	D	E	IFI	G	Н	
1									dix B-3, Page 3
2							Docu	ument Dat	te: 04/25/2017
4	Mercy Housing 1880 P	Pine Street							
5 6									
7				Ope	rating Expense	Det	tail		
8				•					
9					Human Services Agency		Human Services Agency		TOTAL
_	HSA Expenditure Cate	egory		TERM		1 L	7/1/18-6/30/19	07/	1/17-6/30/19
	Rental of Property								
	Telephone								
	Office Supplies, Posta	qe			2,000		2,000		4,000
	Maintenance Supplies	-					,		,
	Printing and Reproduc	-							
	Insurance								
	Staff Travel (local) &T	raining			2,500		2,500		5,000
	Law Library	raining			2,300		2,300		3,000
	Membership/Dues								
	•								
	Rental of Equipment								
21 22	Senior Right Bulletin								
23				_					
24				_					
25	OTHER								
	Supplies for Monthly C	Community Pro	ojects & E	vents.			28,250	-	56,500
27 28	Supervision			_	10,074		10,074		20,148
29				-					
30									
31	TOTAL HSA OPERAT	ING EXPENS	E		\$42,824		\$42,824		\$85,648
32									
33	Developer Match Oper	rating Expense	<u>e</u>						
34	Rental of Property								
35	Telephone								
36	Office Supplies, Posta	ge							
37	Printing and Reproduc	tion							
38	Insurance					_			
39	Law Library							_	
	Membership/Dues								
	Rental of Equipment								
	Volunteer Expenses (F	Receptionist/ir	itake)						
	Client Costs		- /						
	Maintenance Supplies	and Repair							
	Utilities								
	Janitorial service & su	pplies							
47									
	TOTAL DEVELOPER	OPERATING	EXPENS	SE	\$0		\$0		\$0
49				-					
50 51	TOTAL OPERATING I	EXPENSE			\$42,824		\$42,824		\$85,648
52	HSA #3								
53									

Appendix B, Page 4 Document Date: 04/25/2017

Contractor's Name: Mercy Housing (Same as Line 6 on HSA #1)							
		Indire	ect Cost Detail				
1. Salaries and Benefits			Human Services Agency		Human Services Agency		
	TERM		07/1/17-6/30/18		7/1/18-6/30/19		7/1/18-6/30/19
Position Title		FTE	SALARIES	FTE	SALARIES	FTE	TOTAL
EMPLOYEE FRINGE BENEFITS		%		%			
TOTAL SALARIES & BENEFITS		70		70			
TOTAL SALARIES & BENEFITS							
2. Operating Cost							
Expenditure Category							
Q/A Fee i.e Contract Administrator e	<u>tc</u> .		\$10,832		\$10,832		\$21,664
	_						
	_						
	_						
	_						
	_						
	_						
	_						
TOTAL OPERATING COST			\$10,832		\$10,832		\$21,664
TOTAL INDIRECT COST			\$10,832		\$10,832		\$21,664
(Salaries & Benefits + Operating Cos	st)						<u> </u>
HSA# 5							

APPENDIX A-4 – SERVICES TO BE PROVIDED MERCY HOUSING CALIFORNIA

RAD Housing Support Services at 1760 Bush Street July 1, 2017 to June 30, 2019

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services, a division of the Human Services Agency
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that results in substantial functional limitations in one or more major life activity.
Grantee	Mercy Housing
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted housing development units at 1760 Bush Street.

IV. Description of Services

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities

- Build tenant base
- Develop neighborhood partnerships
- 2) Community Building
 - Facilitate community organizing and host events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase access to information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities
- 3) Service Connection
 - Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will hire, train, and supervise 1.50 FTE (leveraged and/or grant funded) to provide services at 1760 Bush Street during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.

Health and Wellness:

- Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.
- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.

Housing Stability:

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.

Community Engagement:

• Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.

V. Location and Time of Services

Services will be provided at 1760 Bush Street, Monday through Friday, during regular office hours of 9 a.m. to 5 p.m., excluding holidays.

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.
- Grantee will communicate and collaborate regularly with DAAS to help provide logistical and operational support to the program and to provide quality services to tenants.
- Grantee will work collaboratively with DAAS to strategize program direction and services provision.
- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
- Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, and provide documentation that tracks demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Grantee will have individual and group service encounters with at least 50% of the tenants per month.
- Grantee will provide to tenants a minimum of one (1) activity or event per week (or 52 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel "strongly" or "very strongly" about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: "How strongly do you feel about being connected and involved in the tenant/resident community at [site]? The options should be "Very strongly", "Strongly", "Somewhat", "Not at all".
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will "agree" or "highly agree" that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: "Do you have better access to services that improve your health and wellness?" The options should be "Highly agree", "Agree", "Neutral", "Disagree", "Highly disagree".
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII - Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
 - Number and percentage of unduplicated tenants with individual and group service encounters.
 - Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
 - Number and percentage of tenants who have rated overall service as "Excellent" or "Good" in Tenant Satisfaction Survey, and number and percentage of response rate.
 - Number and percentage of unduplicated tenants who were outreached to.
 - Number and percentage of households that have maintained or have obtained stable housing.
- C. Grantee will provide Ad Hoc reports as required by the Department.
- D. For assistance with reporting requirements or submission of reports, contact:

Victoria.Chan@sfgov.org Contract Manager, Office of Contract Management Human Services Agency

or

Carrie.Wong@sfgov.org Director, Long Term Care Operations Department of Aging and Adult Services

X. Monitoring Activities

- A. <u>Program Monitoring</u>: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.
- B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	В	С	D
1			*	ppendix B-4, Page 1
2				nt Date: 04/25/2017
3	HUMAN SERVICES AGENCY		GET SUMMARY	
4				
5	Contractor's Name		Contract	Term
				-
6	Mercy Housing : 1760 Bush Street		July 1, 2017 -J	une 30, 2019
7	(Check One) New _X_ Renewal _	Modification		
8	If modification, Effective Date of Mod.	lo. of Mod.		
9	Program: Rental Assistance Demonstration			TOTAL
10	Budget Reference Page No.(s)			
11	Program Term	7/1/17-6/30/18	7/1/18-6/30/19	7/1/17-6/30/19
12	Human Services Agency Expenditures			
13	Salaries & Benefits	\$40,500	\$40,500	\$81,000
	Operating Expense	\$41,718	\$41,718	\$83,436
	Capital Expenditure	\$0	\$0	\$0
	Subtotal	\$82,218	\$82,218	\$164,436
	Indirect Percentage (%)	13%	13%	13%
_	Indirect Cost (Line 16 X Line 17)	\$10,688	\$10,688	\$21,376
	Total HSA Expenditures	\$92,906	\$92,906	\$185,812
20	Developer Match Expenditures	\$ 04,000	# 04,000	¢400.000
	Salaries & Benefits	\$81,000	\$81,000	\$162,000
-	Operating Expense	\$0 \$0	\$0 \$0	\$0 \$0
_	Capital Expenditure Total Developer Expenditures	\$0	\$0	ە 0 \$162,000
24 25	Total Developer Expenditures	φο1,000	φο1,000	\$162,000
	Total HSA and Developer Expenditures	\$173,906	\$173,906	\$347,812
27	HSA Revenues	φ170,500	ψ170,000	ψ0+7,012
	Local General Fund	\$92,906	\$92,906	\$185,812
29		<i>\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\</i>	<i>402,000</i>	\$100,012
30				
31				
32				
33				
34	TOTAL HSA REVENUES	\$92,906	\$92,906	\$185,812
35	Developer Revenues	A-	A a a a a a a a a a a	
36	Developer Match Funds	\$81,000	\$81,000	\$162,000
37 38				
39				
40	Total Developer Revenues	\$81,000	\$81,000	\$162,000
41	Total Revenues	\$173,906	\$173,906	\$347,812
42	Full Time Equivalent (FTE)	1.50	1.50	\$511,51Z
				FF 7400
	Prepared by: Samantha Hogg		Telephone No. (415) 3	55-7120
	HSA-CO Review Signature:			
	HSA #1			
47				

	A	В	С	D	E	F
1						ppendix B-4, Page 2
2 3					Docume	nt Date: 04/25/2017
4	Mercy Housing : 1760 Bush Street					
5						
6						
7			Salaries &	& Benefi	ts Detail	
8						
9		Human	Services	Huma	n Services	
10		Ag	ency	A	gency	TOTAL
11	TERM		-6/30/18		8-6/30/19	7/1/17-6/30/19
12	POSITION TITLE	FTE	SALARIES	FTE	SALARIES	•
13	Resident Services Coordinator	0.50	\$31,640	0.50	\$31,640	\$63,280
14						
15						
16 17						
18						
19						
20						
21						
22						
23	TOTALS	0.50	\$31,640	0.50	\$31,640	\$63,280
24			1 - 1		<i>, , , , , , , , , , , , , , , , , , , </i>	+ ,
25						
26 27	EMPLOYEE FRINGE BENEFITS	28%	\$8,860	28%	\$8,860	\$17,720
28						
29	TOTAL HSA SALARIES & BENEFITS		\$40,500		\$40,500	\$81,000
30						
31	DEVELOPER MATCH POSITION TITLE					
	Resident Services Coorindator	1.00	\$63,281	1.00	\$63,281	\$126,562
33			<i>\\</i> 00,201		<i>\\</i>	÷==0,002
34						
35						
36						
37						
38	TOTALS	1.00	\$63,281	1.00	\$63,281	\$126,562
39		1.00	ψ00,201	1.00	ψ00,201	ψ120,002
		200/	¢47 740	200/	¢17 740	¢25 400
40 41	EMPLOYEE FRINGE BENEFITS	28%	\$17,719	28%	\$17,719	\$35,438
41	TOTAL DEVELOPER SALARIES & BENE	FITS	\$81,000		\$81,000	\$162,000
43	TOTAL SALARIES & BENEFITS	1.50	\$121,500	1.50	\$121,500	\$243,000
44					-	
45	HSA #2					
46						

	АВ		С	D	E	TF	G	Н
1	·			_			•	Appendix B-4, Page 3
2							Docu	ment Date: 04/25/2017
4	Mercy Housing : 1760 Bush S	treet						
5								
6 7				Ope	rating Expens	e D	etail	
8								
9					Human Service Agency	s	Human Services Agency	TOTAL
	HSA Expenditure Category			TERM			7/1/18-6/30/19	7/1/17-6/30/19
11	Rental of Property					_		
12	Telephone				\$1,00	00	\$1,000	\$2,000
	Office Supplies, Postage				\$2,00	00	\$2,000	\$4,000
	Maintenance Supplies and Re	pair						· · · · · ·
	Printing and Reproduction	1						
	Insurance					_		
	Staff Travel (local) & Training				\$2,13	38	\$2,138	\$4,276
	Law Library				ψ2, Ν	<u> </u>		
	Membership/Dues							
	Rental of Equipment					_		
	Senior Right Bulletin							·
22								·
23				_ :		_		
24								·
25	OTHER							
	Supplies for Monthly Commur Events, including, but not limit			ł				
	Wellness programs, Education				•		•	
	Food & Beverages. Supervision			- •	\$27,00 \$9,58		\$27,000 \$9,580	
28				_ :	\$0,00			
29								
30								
	TOTAL HSA OPERATING EX	PENSE			\$41,7	18	\$41,718	\$83,436
32								
	Developer Match Operating E	xpense						
	Rental of Property					_		
	Telephone					_		
	Office Supplies, Postage					_		
	Printing and Reproduction							·
	Insurance							
	Law Library							
	Membership/Dues							
41	Rental of Equipment							
42	Volunteer Expenses (Reception	onist/intak	ke)					
	Client Costs							
44	Maintenance Supplies and Re	pair						
45	Utilities							
46	Janitorial service & supplies							
47								
	TOTAL DEVELOPER OPERA	TING EX	PENSE		\$	0	\$0	\$0
49 50	TOTAL OPERATING EXPENS	SE			\$41,71	8	\$41,718	\$83,436
51					. /			
52 53	HSA #3							

Appendix B-4, Page 4 Document Date: 04/25/2017 Mercy Housing : 1760 Bush Street (Same as Line 6 on HSA #1) **Indirect Cost Detail Human Services** Human Services 1. Salaries and Benefits Agency Agency TOTAL TERM 7/1/17-6/30/18 7/1/18-6/30/19 7/1/17-6/30/19 **Position Title** FTE SALARIES FTE SALARIES FTE SALARIES EMPLOYEE FRINGE BENEFITS % % TOTAL SALARIES & BENEFITS 2. Operating Cost Expenditure Category Q/A Fee i.e Contract Administrator, etc. \$10,712 \$10,688 \$21,400 TOTAL OPERATING COST \$10,712 \$10,688 \$21,400 TOTAL INDIRECT COST \$10,712 \$10,688 \$21,400 (Salaries & Benefits + Operating Cost) HSA# 5

APPENDIX A-5 – SERVICES TO BE PROVIDED MERCY HOUSING CALIFORNIA

RAD Housing Support Services at JFK Towers (2451 Sacramento Street) July 1, 2017 to June 30, 2019

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services, a division of the Human Services Agency
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that results in substantial functional limitations in one or more major life activity.
Grantee	Mercy Housing
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted housing development units at JFK Towers (2451 Sacramento Street).

IV. Description of Services

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities

- Build tenant base
- Develop neighborhood partnerships
- 2) Community Building
 - Facilitate community organizing and host events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase access to information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities
- 3) Service Connection
 - Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will hire, train, and supervise 1.25 FTE (leveraged and/or grant funded) to provide services at JFK Towers (2451 Sacramento Street) during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.

Health and Wellness:

- Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.
- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.

Housing Stability:

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.

Community Engagement:

• Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.

V. Location and Time of Services

Services will be provided at JFK Towers (2451 Sacramento Street), Monday through Friday, during regular office hours of 9 a.m. to 5 p.m., excluding holidays.

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.
- Grantee will communicate and collaborate regularly with DAAS to help provide logistical and operational support to the program and to provide quality services to tenants.
- Grantee will work collaboratively with DAAS to strategize program direction and services provision.
- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
- Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, and provide documentation that tracks demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Grantee will have individual and group service encounters with at least 50% of the tenants per month.
- Grantee will provide to tenants a minimum of one (1) activity or event per week (or 52 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel "strongly" or "very strongly" about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: "How strongly do you feel about being connected and involved in the tenant/resident community at [site]? The options should be "Very strongly", "Strongly", "Somewhat", "Not at all".
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will "agree" or "highly agree" that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: "Do you have better access to services that improve your health and wellness?" The options should be "Highly agree", "Agree", "Neutral", "Disagree", "Highly disagree".
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII - Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
 - Number and percentage of unduplicated tenants with individual and group service encounters.
 - Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
 - Number and percentage of tenants who have rated overall service as "Excellent" or "Good" in Tenant Satisfaction Survey, and number and percentage of response rate.
 - Number and percentage of unduplicated tenants who were outreached to.
 - Number and percentage of households that have maintained or have obtained stable housing.
- C. Grantee will provide Ad Hoc reports as required by the Department.
- D. For assistance with reporting requirements or submission of reports, contact:

Victoria.Chan@sfgov.org Contract Manager, Office of Contract Management Human Services Agency

or

Carrie.Wong@sfgov.org Director, Long Term Care Operations Department of Aging and Adult Services

X. Monitoring Activities

- A. <u>Program Monitoring</u>: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.
- B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	А	В	С	D
1			Á	ppendix B-5, Page 1
2			Docur	nent Date: 4/25/2017
3	HUMAN SERVICES AGENCY	CONTRACT BUD	GET SUMMARY	
4				
5	Contractor's Name		Contrac	t Term
6	Mercy Housing : JFK Towers		July 1, 2017	June 30, 2019
7	(Check One) NewX Renewal			,
	· · · · — — — —			
8	If modification, Effective Date of Mod.	lo. of Mod.		
9	Program: Rental Assistance Demonstration			TOTAL
10	Budget Reference Page No.(s)			
11	Program Term	7/1/17-6/30/18	7/1/18-6/30/19	7/1/17-6/30/19
12	Human Services Agency Expenditures			
	Salaries & Benefits	\$20,250	\$20,250	\$40,500
	Operating Expense	\$38,087	\$38,087	\$76,174
	Capital Expenditure	\$0	\$0	\$0
	Subtotal	\$58,337	\$58,337	\$116,674
	Indirect Percentage (%)	13%	13%	13%
	Indirect Cost (Line 16 X Line 17)	\$7,584	\$7,584	\$15,168
19		\$65,921	\$65,921	\$131,842
20	Developer Match Expenditures	• • • • • •	• • • • • • •	• • • • • • • •
21	Salaries & Benefits	\$81,000	\$81,000	\$162,000
	Operating Expense	\$0	\$0	\$0
23		\$0	\$0	\$0
24	Total Developer Expenditures	\$81,000	\$81,000	\$162,000
25		* 4 4 0 0 0 4	.	\$ 000.040
26		\$146,921	\$146,921	\$293,842
27	HSA Revenues	\$ 05.004	* • -- •• - •	* 4 0 4 0 4 0
28	Local General Fund	\$65,921	\$65,921	\$131,842
29 30				
31				
32				
33				
34	TOTAL HSA REVENUES	\$65,921	\$65,921	\$131,842
35	Developer Revenues		. ,	. ,
36	Developer Match Funds	\$81,000	\$81,000	\$162,000
37				
38				
39				
40	Total Developer Revenues	\$81,000	\$81,000	\$162,000
41	Total Revenues	\$146,921	\$146,921	\$293,842
42	Full Time Equivalent (FTE)	1.25	1.25	
44	Prepared by: Samantha Hogg		Telephone No. (415) 3	355-7120
45	HSA-CO Review Signature:			
46	HSA #1			
47				

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1	<u>_</u>		0	U		ppendix B-5, Page 2
2						nent Date: 4/25/2017
3						
4 5	Mercy Housing : JFK Towers					
6						
7			Salaries &	2 Renefi	ts Detail	
8			ouluites e	Benen	to Detail	
9						
		Human	Services	Humai	n Services	
10			ency		gency	TOTAL
11 12	TERM POSITION TITLE	7/1/17 FTE	-6/30/18 SALARIES	7/1/18 FTE	8-6/30/19 SALARIES	7/1/17-6/30/19
						• ••••
13	Resident Services Coordinator	0.25	\$15,820	0.25	\$15,820	\$31,640
14						
15						
16						
17						
18						
19						
20						
21						
22						
23	TOTALS	0.25	\$15,820	0.25	\$15,820	\$31,640
24			• • •	•		
25						
26	EMPLOYEE FRINGE BENEFITS	28%	\$4,430	28%	\$4,430	\$8,860
27 28						
29	TOTAL HSA SALARIES & BENEFITS		\$20,250		\$20,250	\$40,500
	TO THE HOA CHEARLES & DENELTING		ψ20,200	I	ψ20,200	φ+0,300
30						
31	DEVELOPER MATCH					
32	POSITION TITLE					
33	Resident Services Coorindator	1.00	\$63,281	1.00	\$63,281	\$126,562
34						
35						
36						
37						
38		4.00	# 00 00 i	4.00	* ~~ ~~ ·	0 400 5 05
39	TOTALS	1.00	\$63,281	1.00	\$63,281	\$126,562
40						
41	EMPLOYEE FRINGE BENEFITS	28%	\$17,719	28%	\$17,719	\$35,438
42						
43	TOTAL DEVELOPER SALARIES & BENE	FITS	\$81,000		\$81,000	\$162,000
44	TOTAL SALARIES & BENEFITS	1.25	\$101,250	1.25	\$101,250	\$202,500
		1.20	Ψ101,200	1.20	Ψ101,200	<i>\\</i> 202,000
45 46	HSA #2					
47						

1 Appenduk B-6. Page : Document Date: 4/25/2017 3 Mercy Housing : JFK Towers 6 Operating Expense Detail 9 Expenditure Category TERM 11 Rental of Property TOTAL 12 Telephone 960 960 13 Office Supplies, Postage 1.630 3.260 14 Maintenance Supplies and Repair 1.630 3.260 15 Printing and Reproduction		A	В	С	D	E	F	G	н	1
2 Document Date: 4/25/2017 4 Mercy Housing : JFK Towers	1			<u> </u>		£	1 ⁴	5		ndix B-5, Page 3
Mercy Housing : JFK Towers Image: Constraint of the second sec								Do		
6 0 Operating Expense Detail 10 HSA Expanditure Category TERM 7/1/17-6/30/19 7/1/18-6/30/19 7/1/17-6/30/19 11 Rental of Property		Mercy Housing : JFK	Towers							
Operating Expense Detail B Human Services Agency Human Services Agency TOTAL 11 Rental of Property	5	,								
B Human Services Agency Human Services Agency TotAL 19 ISA Expanditure Category TERM 7/1/17-630/19 7/1/17-630/19 11 Rental of Property					One	rating Expanse	Do	tail		
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10 HSA Expenditure Category TERM 7/1/13-6/30/19 7/1/13-6/30/19 11 Rental of Property						Human Services	ן ר	Human Services		
11 Rental of Property 960 960 1,920 12 Telephone 960 960 1,920 13 Office Supplies, Postage 1,630 3,260 14 Maintenance Supplies and Repair	_				TEDM					-
12 Telephone 960 960 1,920 13 Office Supplies, Postage 1,630 1,630 3,260 14 Maintenance Supplies and Repair			egory		IERM	7/1/17-6/30/18		7/1/18-6/30/19		//1/17-6/30/19
13 Office Supplies, Postage 1,630 3,260 14 Maintenance Supplies and Repair						000		000		4.000
14 Maintenance Supplies and Repair		-								
15 Printing and Reproduction 16 Insurance 17 Staff Travel (local) & Training 2,000 18 Law Library			-			1,630		1,630		3,260
11 Insurance			-							
11 Staff Travel (local) & Training 2.000 2.000 4.000 18 Law Library										
18 Law Library			raining			2 000		2 000		4 000
19 Membership/Dues			ranning			2,000		2,000		4,000
20 Rental of Equipment		•								
21 Senior Right Bulletin		-								
22										
23										
24										
26 Supplies for Monthly Community Projects & Events. (li 24,500 24,500 49,000 27 Supervision 8,997 8,997 17,994 28					_					
26 Supplies for Monthly Community Projects & Events. (li 24,500 24,500 49,000 27 Supervision 8,997 8,997 17,994 28	25	OTHER			_					
28			Community Pro	jects & Ev	<u>/e</u> nts. (li	24,500		24,500		49,000
29	_	Supervision			_	8,997		8,997		17,994
30 31 TOTAL HSA OPERATING EXPENSE \$38,087 \$38,087 \$76,174 32 33 Developer Match Operating Expense 34 Rental of Property					_					
31 TOTAL HSA OPERATING EXPENSE \$38,087 \$38,087 \$76,174 32					_					
32				E		\$38.087		\$38.087		\$76 174
33 Developer Match Operating Expense 34 Rental of Property 35 Telephone 36 Office Supplies, Postage 37 Printing and Reproduction 38 Insurance 39 Law Library 40 Membership/Dues 41 Rental of Equipment 42 Volunteer Expenses (Receptionist/intake) 43 Client Costs 44 Maintenance Supplies and Repair 45 Utilities 46 Janitorial service & supplies 47 TOTAL DEVELOPER OPERATING EXPENSE \$0 \$0 48 TOTAL OPERATING EXPENSE \$38,087 \$76,174 51 HSA #3 \$38,087 \$76,174		TO TAL HOA OF LIKAT		-		\$30,007		\$30,007		ψ <i>1</i> 0,174
34 Rental of Property 35 Telephone 36 Office Supplies, Postage 37 Printing and Reproduction 38 Insurance 39 Law Library 40 Membership/Dues 41 Rental of Equipment 42 Volunteer Expenses (Receptionist/intake) 43 Client Costs 44 Maintenance Supplies and Repair 45 Utilities 46 TOTAL DEVELOPER OPERATING EXPENSE 50 \$38,087 50 \$38,087 51 HSA #3										
35 Telephone			rating Expense	2						
36 Office Supplies, Postage										
37 Printing and Reproduction	35	Telephone								
38 Insurance	36	Office Supplies, Posta	ige							
39 Law Library 40 Membership/Dues 41 Rental of Equipment 42 Volunteer Expenses (Receptionist/intake) 43 Client Costs 44 Maintenance Supplies and Repair 45 Utilities 46 Janitorial service & supplies 47	37	Printing and Reproduc	ction							
40 Membership/Dues	38	Insurance								
41 Rental of Equipment 42 Volunteer Expenses (Receptionist/intake) 43 Client Costs 44 Maintenance Supplies and Repair 45 Utilities 46 Janitorial service & supplies 47 48 TOTAL DEVELOPER OPERATING EXPENSE 50 TOTAL OPERATING EXPENSE 50 TOTAL OPERATING EXPENSE 51 52 453	39	Law Library								
42 Volunteer Expenses (Receptionist/intake) 43 Client Costs 44 Maintenance Supplies and Repair 45 Utilities 46 Janitorial service & supplies 47	40	Membership/Dues								
42 Volunteer Expenses (Receptionist/intake) 43 Client Costs 44 Maintenance Supplies and Repair 45 Utilities 46 Janitorial service & supplies 47	41	Rental of Equipment							_	
43 Client Costs			Receptionist/in	take)						
44 Maintenance Supplies and Repair 45 Utilities 46 Janitorial service & supplies 47				,						
45 Utilities 46 Janitorial service & supplies 47			and Repair							
46 Janitorial service & supplies 47 48 TOTAL DEVELOPER OPERATING EXPENSE 49 50 TOTAL OPERATING EXPENSE 50 TOTAL OPERATING EXPENSE 51 \$38,087 52 HSA #3										
47 48 TOTAL DEVELOPER OPERATING EXPENSE \$0 \$0 49 50 TOTAL OPERATING EXPENSE \$38,087 \$38,087 50 TOTAL OPERATING EXPENSE \$38,087 \$38,087 \$76,174 51 52 HSA #3 \$38,087 \$38,087 \$38,087			nnlies							
48 TOTAL DEVELOPER OPERATING EXPENSE \$0 \$0 \$0 49 50 TOTAL OPERATING EXPENSE \$38,087 \$38,087 \$76,174 50 TOTAL OPERATING EXPENSE \$38,087 \$38,087 \$76,174 51 52 HSA #3 53 53 53		Sumonal Service & Su	hhirea							
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50 TOTAL OPERATING EXPENSE \$38,087 \$38,087 \$76,174 51 52 HSA #3 538,087 \$38,		I OTAL DEVELOPER	OPERATING	EVLENSE	-	\$0		\$0		\$0
52 HSA #3	50	TOTAL OPERATING	EXPENSE			\$38,087		\$38,087		\$76,174
		HSA #3								

Appendix B, Page 4 Document Date: 4/25/2017 Mercy Housing : JFK Towers (Same as Line 6 on HSA #1) **Indirect Cost Detail Human Services** Human Services 1. Salaries and Benefits Agency Agency TOTAL TERM 7/1/17-6/30/18 7/1/18-6/30/19 7/1/17-6/30/19 **Position Title** FTE SALARIES FTE SALARIES SALARIES EMPLOYEE FRINGE BENEFITS % % TOTAL SALARIES & BENEFITS 2. Operating Cost Expenditure Category Q/A Fee i.e Contract Administrator, etc. \$7,584 \$7,584 \$15,168 TOTAL OPERATING COST \$7,584 \$7,584 \$15,168 TOTAL INDIRECT COST \$7,584 \$7,584 \$15,168 (Salaries & Benefits + Operating Cost) HSA# 5

APPENDIX A-6 – SERVICES TO BE PROVIDED MERCY HOUSING CALIFORNIA

RAD Housing Support Services at 2698 California Street July 1, 2017 to June 30, 2019

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services, a division of the Human Services Agency
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that results in substantial functional limitations in one or more major life activity.
Grantee	Mercy Housing
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted housing development units at 2698 California Street.

IV. Description of Services

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities

- Build tenant base
- Develop neighborhood partnerships
- 2) Community Building
 - Facilitate community organizing and host events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase access to information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities
- 3) Service Connection
 - Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will hire, train, and supervise 1.00 FTE (leveraged and/or grant funded) to provide services at 2698 California Street during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.

Health and Wellness:

- Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.
- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.

Housing Stability:

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.

Community Engagement:

• Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.

V. Location and Time of Services

Services will be provided at 2698 California Street, Monday through Friday, during regular office hours of 9 a.m. to 5 p.m., excluding holidays.

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.
- Grantee will communicate and collaborate regularly with DAAS to help provide logistical and operational support to the program and to provide quality services to tenants.
- Grantee will work collaboratively with DAAS to strategize program direction and services provision.
- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
- Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, and provide documentation that tracks demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Grantee will have individual and group service encounters with at least 50% of the tenants per month.
- Grantee will provide to tenants a minimum of one (1) activity or event per week (or 52 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel "strongly" or "very strongly" about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: "How strongly do you feel about being connected and involved in the tenant/resident community at [site]? The options should be "Very strongly", "Strongly", "Somewhat", "Not at all".
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will "agree" or "highly agree" that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: "Do you have better access to services that improve your health and wellness?" The options should be "Highly agree", "Agree", "Neutral", "Disagree", "Highly disagree".
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII - Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
 - Number and percentage of unduplicated tenants with individual and group service encounters.
 - Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
 - Number and percentage of tenants who have rated overall service as "Excellent" or "Good" in Tenant Satisfaction Survey, and number and percentage of response rate.
 - Number and percentage of unduplicated tenants who were outreached to.
 - Number and percentage of households that have maintained or have obtained stable housing.
- C. Grantee will provide Ad Hoc reports as required by the Department.
- D. For assistance with reporting requirements or submission of reports, contact:

Victoria.Chan@sfgov.org Contract Manager, Office of Contract Management Human Services Agency

or

Carrie.Wong@sfgov.org Director, Long Term Care Operations Department of Aging and Adult Services

X. Monitoring Activities

- A. <u>Program Monitoring</u>: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.
- B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

<u> </u>	A	В	С	D						
1	7	Б	•	ppendix B-6, Page 1						
2	Document Date: 04/25/2017									
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY									
4		CONTRACT BOD								
5	Contractor's Name		Contract	Term						
			July 1, 2017 - June 30, 2019							
6	Mercy Housing : 2698 California		July 1, 2017 - J	une 30, 2019						
7	(Check One) NewX Renewal	Modification								
8	If modification, Effective Date of Mod.	lo. of Mod.								
9	Program: Rental Assistance Demonstration			TOTAL						
10	Budget Reference Page No.(s)									
11	Program Term	7/1/17-6/30/18	7/1/18-6/30/19	7/1/17-6/30/19						
12	Human Services Agency Expenditures									
	Salaries & Benefits	\$20,250	\$20,250	\$40,500						
	Operating Expense	\$21,508	\$21,508	\$43,016						
	Capital Expenditure	\$0	\$0	\$0						
	Subtotal	\$41,758	\$41,758	\$83,516						
	Indirect Percentage (%)	13%	13%	13%						
	Indirect Cost (Line 16 X Line 17)	\$5,429	\$5,429	\$10,858						
20	Total HSA Expenditures Developer Match Expenditures	\$47,187	\$47,187	\$94,374						
	Salaries & Benefits	\$60,750	\$60,750	\$121,500						
	Operating Expense	\$00,750	\$00,750	\$121,500						
	Capital Expenditure	\$0 \$0	\$0 \$0	\$0 \$0						
	Total Developer Expenditures	\$60,750	\$60,750	\$121,500						
25		<i> </i>	¢00,100	¢,000						
-	Total HSA and Developer Expenditures	\$107,937	\$107,937	\$215,874						
27	HSA Revenues									
28	Local General Fund	\$47,187	\$47,187	\$94,374						
29										
30										
31										
32 33										
34	TOTAL HSA REVENUES	\$47,187	\$47,187	\$94,374						
35	Developer Revenues	ψτι, ι Ο Ι	ψ-1,107	ψυ-,υ/+						
36	Developer Match Funds	\$60,750	\$60,750	\$121,500						
37		<i></i>	÷:::::::::::::::::::::::::::::::::::::	÷ /= .,000						
38										
39			***	* · * · =						
40	Total Developer Revenues	\$60,750	\$60,750	\$121,500						
41	Total Revenues	\$107,937	\$107,937	\$215,874						
42	Full Time Equivalent (FTE)	1.00	1.00	2.00						
44	Prepared by: Samantha Hogg	-	Telephone No. (415)	Date 04/25/2017						
45	HSA-CO Review Signature:									
46	HSA #1									
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2					Documer	t Date: 04/25/2017					
3 4	Mercy Housing : 2698 California										
5											
6											
7	Salaries & Benefits Detail										
8	-										
9			Services		n Services						
10			ency		gency	TOTAL					
11	TERM		-6/30/18		8-6/30/19	7/1/17-6/30/19					
12	POSITION TITLE	FTE	SALARIES	FTE	SALARIES						
13	Resident Services Coordinator	0.25	\$15,820	0.25	\$15,820	\$31,640					
14											
15											
16											
17											
18											
19											
20											
21											
22											
23	TOTALS	0.25	\$15,820	0.25	\$15,820	\$31,640					
24 25											
26	EMPLOYEE FRINGE BENEFITS	28.0%	\$4,430	28.0%	\$4,430	\$8,860					
20	LINFLOTEL TRINGL BEINEFTIS	20.070	φ 4 ,430	20.070	φ 4 ,430	\$8,800					
28											
29	TOTAL HSA SALARIES & BENEFITS		\$20,250		\$20,250	\$40,500					
30											
31	DEVELOPER MATCH POSITION TITLE										
32	Resident Services Coorindator	0.75	\$47,460	0.75	\$47,460	\$94,920					
33											
34											
35											
36											
37											
38	TOTALS	0.75	\$47,460	0.75	\$47,460	\$94,920					
39			. ,		. ,	··· /					
40	EMPLOYEE FRINGE BENEFITS	28.0%	\$13,290	28.0%	\$13,290	\$26,580					
41											
42	TOTAL DEVELOPER SALARIES & BENE	FITS	\$60,750		\$60,750	\$121,500					
43	TOTAL SALARIES & BENEFITS	1.00	\$81,000	1.00	\$81,000	\$162,000					
44											
45 46	HSA #2										

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2							Docu	ment Date:	04/25/2017
4	Contractor's Name: N	lercy Housing							
5									
6 7				Ope	rating Expense	De	tail		
8				Ope	Human Services	1	Human Services	T	
9					Agency	ļ	Agency	т	OTAL
10	HSA Expenditure Cate	egory		TERM	7/1/17-6/30/18	_	7/1/18-6/30/19	7/1/17	7-6/30/19
11	Rental of Property					_			
12	Telephone					_			
13	Office Supplies, Posta	ige			1,200)	1,200		2,400
14	Maintenance Supplies	and Repair							
	Printing and Reproduc					-			
	Insurance					-			
						-	4.040		0.000
	Staff Travel (local) &T	raining			1,348	-	1,348		2,696
	Law Library					-		- <u></u>	
19	Membership/Dues					-			
	Rental of Equipment					_		<u> </u>	
	Senior Right Bulletin					_			
22						-		. <u> </u>	
23 24						-			
						-			
	OTHER Supplies for Monthly (Community Proi	ects & Eve	ents. Inc	10,000)	10,000		20,000
	Supervision			_	8,960	-	8,960		17,920
28	•					_			
29				_		_			
30									
31	TOTAL HSA OPERAT	ING EXPENSE			\$21,508	-	\$21,508		\$43,016
32									
33	Developer Match Ope	rating Expense							
34	Rental of Property					_			
35	Telephone					_			
36	Office Supplies, Posta	ige				_			
37	Printing and Reproduc	ction				-			
	Insurance					-			
	Law Library					-			
	-					-			
	Membership/Dues					-			
	Rental of Equipment					_			
	Volunteer Expenses (I	Receptionist/int	ake)			_			
	Client Costs					_			
44	Maintenance Supplies	and Repair				_			
45	Utilities					_		. . <u> </u>	
46	Janitorial service & su	pplies				_			
47									
48	TOTAL DEVELOPER	OPERATING E	XPENSE		\$0	_	\$0		\$0
49						_			¢40.040
50 51	TOTAL OPERATING	EXPENSE			\$21,508	-	\$21,508		\$43,016
52	HSA #3								
53									
APPENDIX A-1 – SERVICES TO BE PROVIDED THE TENDERLOIN NEIGHBORHOOD DEVELOPMENT CORPORATION

RAD Housing Support Services at 939-951 EDDY STREET July 1, 2017 to June 30, 2019

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services, a division of the Human Services Agency
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that results in substantial functional limitations in one or more major life activity.
Grantee	Tenderloin Neighborhood Development Corporation
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older
Subcontractor	Northern California Presbyterian Homes and Services (NCPHS) will be contracted by the grantee and paid with grant funds to provide services and/or achieve service and outcome objectives as required by this grant.

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units at 939-951 Eddy Street.

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities
 - Build tenant base
 - Develop neighborhood partnerships
- 2) Community Building
 - Community organizing and events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities
- 3) Service Connection
 - Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will hire, train, and supervise1 FTE (leveraged and/or grant funded) to provide services at 939-951 Eddy Street during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.

- Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.
- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.

- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.

Community Engagement:

• Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.

V. Location and Time of Services

Services will be provided at 939-951 Eddy Street, Monday through Friday during regular office hours, excluding holidays.

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.
- Grantee will communicate and collaborate regularly with DAAS to help provide logistical and operational support to the program and to provide quality services to tenants.
- Grantee will work collaboratively with DAAS to strategize program direction and services provision.
- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
- Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.

VII. Service Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Grantee will have individual and group service encounters with at least 65% of the tenants per month.
- Grantee will provide to tenants a minimum of two (2) activities or events per week (or 104 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel "strongly" or "very strongly" about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: "How strongly do you feel about being connected and involved in the tenant/resident community at [site]? The options should be "Very strongly", "Strongly", "Somewhat", "Not at all".
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will "agree" or "highly agree" that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: "Do you have better access to services that improve your health and wellness?" The options should be "Highly agree", "Agree", "Neutral", "Disagree", "Highly disagree".
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
 - Number and percentage of unduplicated tenants with individual and group service encounters.

4 of 5

Appendix A-1

- Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
- Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
 - Number and percentage of tenants who have rated overall service as "Excellent" or "Good" in Tenant Satisfaction Survey, and number and percentage of response rate.
 - Number and percentage of unduplicated tenants who were outreached to.
 - Number and percentage of households that have maintained or have obtained stable housing.
- C. Grantee will provide Ad Hoc reports as required by the Department.
- D. For assistance with reporting requirements or submission of reports, contact:

or

Carrie.Wong@sfgov.org Director, Long Term Care Operations Department of Aging and Adult Services

- A. <u>Program Monitoring</u>: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.
- B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

<u> </u>	Α	В	С	D
1	A	D	-	ppendix B-1, Page 1
2				nent Date: 4/13/2017
2	HUMAN SERVICES AGENCY			
3	HUMAN SERVICES AGENCI	BY PROGRA		
5	Contractor's Name		Contrac	t Term
6	Tenderloin Neighborhood Development Corp	poration	July 1, 2017-J	une 30, 2019
7	(Check One) NewX Renewal	Modification		
8	If modification, Effective Date of Mod.	lo. of Mod.		
9	Program: Rental Assistance Demonstration - 93	9-51 Eddy Street		TOTAL
10	Budget Reference Page No.(s)			
11	Program Term	7/1/17-6/30/18	7/1/18-6/30/19	7/1/17-6/30/19
12	Human Services Agency Expenditures			
13	Salaries & Benefits	\$0	\$0	\$0
_	Operating Expense	\$30,129	\$30,129	\$60,258
	Capital Expenditure	\$0	\$0	\$0
	Subtotal	\$30,129	\$30,129	\$60,258
	Indirect Percentage (%)	6%	6%	6%
18	Indirect Cost (Line 16 X Line 17)	\$1,808	\$1,808	\$3,616
19	Total HSA Expenditures	\$31,937	\$31,937	\$63,874
20	Developer Match Expenditures			
21	Salaries & Benefits	\$0	\$0	\$0
22	Operating Expense	\$76,415	\$76,415	\$152,830
23	Capital Expenditure	0	0	\$0
	Subtotal	\$76,415	\$76,415	\$152,830
25	Indirect Percentage (%)	6%	6%	6%
26	Indirect Cost (Line 16 X Line 17)	\$4,585	\$4,585	\$9,170
27	Total Developer Expenditures	\$81,000	\$81,000	\$162,000
28				
29	Total HSA and Developer Expenditures	\$112,937	\$112,937	\$225,874
30	HSA Revenues			
31	Local General Fund	\$31,937	\$31,937	\$63,874
32				
33				
34				
35				
36 37				
37				
39	TOTAL HSA REVENUES	\$31,937	\$31,937	\$63,874
40	Developer Revenues	φ01,007	φ01,007	φ00,01 -
40	Developer Match Funds	\$81,000	\$81,000	\$162,000
42		φ01,000	φ01,000	ψ102,000
43				
44				
45	Total Developer Revenues	\$81,000	\$81,000	\$162,000
46	Total Revenues	\$112,937	\$112,937	\$225,874
47	Full Time Equivalent (FTE)			
	Prepared by: Paul Sussman		Telephone No.	Date
	HSA-CO Review Signature:			
	-			
	HSA #1			
52				

	A	В	С	D	E	F	G H
1			5		1-1		Appendix B-1, Page 2
2						Doc	ument Date: 4/13/2017
	Tenderloin Neighborh	ood Developme	nt Corp	oration			
5							
6 7			Opera	ating Expense	Deta	ail	
8			-				
9				Human Service Agency	s	Human Services Agency	TOTAL
-	HSA Expenditure Cate	egory	TERM] L ;	7/1/18-6/30/19	7/1/17-6/30/19
11	Rental of Property						
	Telephone						
	Office Supplies, Posta	are					
	Maintenance Supplies	-					
	Printing and Reproduc						
		.					
	Staff Travel (local) &T	raining					
	Law Library						
	Membership/Dues						
	Rental of Equipment						
21	Senior Right Bulletin						
	Sub-Contractor (NCPI	HS)		30,12	29	30,129	60,258
23 24							
	OTHER						
26	OTTLER						
27							
28							
29 30							
	TOTAL HSA OPERAT	TING EXPENSE		\$30,12	9	\$30,129	\$60,258
32			-			<i>\\</i>	
	Developer Match Ope	rating Expense					
	Rental of Property						
	Office Supplies, Posta	-					
	Printing and Reproduc	CTION					
	Insurance						
	Law Library						
	Membership/Dues						
	Rental of Equipment						
42	Volunteer Expenses (F	Receptionist/inta	ake)				
43	Client Costs						
44	Maintenance Supplies	and Repair					
45	Utilities						
46	Janitorial service & su	pplies					
47	Sub-Contractor (NCPI	HS)		76,41	5	76,415	152,830
48							
	TOTAL DEVELOPER	OPERATING E	XPEN	\$76,41	5	\$76,415	\$152,830
50 51	TOTAL OPERATING	EXPENSE		\$106,54	4	\$106,544	\$213,089
52				φ100,0-	<u> </u>	\$100,0 11	φ210,009
53 54	HSA #3						
J4							

APPENDIX A-2 – SERVICES TO BE PROVIDED THE TENDERLOIN NEIGHBORHOOD DEVELOPMENT CORPORATION

RAD Housing Support Services at 430 TURK STREET July 1, 2017 to June 30, 2019

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services, a division of the Human Services Agency
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that results in substantial functional limitations in one or more major life activity.
Grantee	Tenderloin Neighborhood Development Corporation
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older
Subcontractor	Northern California Presbyterian Homes and Services (NCPHS) will be contracted by the grantee and paid with grant funds to provide services and/or achieve service and outcome objectives as required by this grant.

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units at 430 Turk Street.

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities
 - Build tenant base
 - Develop neighborhood partnerships
- 2) Community Building
 - Community organizing and events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities
- 3) Service Connection
 - Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will subcontract with NCPHS to hire, train, and supervise 1.25 FTE (leveraged and/or grant funded) to provide services at 430 Turk Street during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.

- Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.
- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.

- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.

Community Engagement:

• Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.

V. Location and Time of Services

Services will be provided at 430 Turk Street, Monday through Friday during regular office hours, excluding holidays.

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.
- Grantee will communicate and collaborate regularly with DAAS to help provide logistical and operational support to the program and to provide quality services to tenants.
- Grantee will work collaboratively with DAAS to strategize program direction and services provision.
- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
- Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.

VII. Service Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Grantee will have individual and group service encounters with at least 65% of the tenants per month.
- Grantee will provide to tenants a minimum of two (2) activities or events per week (or 104 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel "strongly" or "very strongly" about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: "How strongly do you feel about being connected and involved in the tenant/resident community at [site]? The options should be "Very strongly", "Strongly", "Somewhat", "Not at all".
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will "agree" or "highly agree" that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: "Do you have better access to services that improve your health and wellness?" The options should be "Highly agree", "Agree", "Neutral", "Disagree", "Highly disagree".
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
 - Number and percentage of unduplicated tenants with individual and group service encounters.

- Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
- Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
 - Number and percentage of tenants who have rated overall service as "Excellent" or "Good" in Tenant Satisfaction Survey, and number and percentage of response rate.
 - Number and percentage of unduplicated tenants who were outreached to.
 - Number and percentage of households that have maintained or have obtained stable housing.
- C. Grantee will provide Ad Hoc reports as required by the Department.
- D. For assistance with reporting requirements or submission of reports, contact:

or

Carrie.Wong@sfgov.org Director, Long Term Care Operations Department of Aging and Adult Services

- A. <u>Program Monitoring</u>: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.
- B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	В	С	D
1			A	ppendix B-2, Page 1
2				ment Date: 4/13/2017
3	HUMAN SERVICES AGENCY	CONTRACT BUDG	GET SUMMARY	
4		BY PROGRAM		
<u> </u>	Ocastro starla Nama	BIIROORA		• Т. а
5	Contractor's Name		Contrac	tierm
6	Tenderloin Neighborhood Development Corp	poration	July 1, 2017-J	une 30, 2019
7	(Check One) NewX Renewal	Modification		
8	If modification, Effective Date of Mod.	lo. of Mod.		
0	In modification, Effective Date of Mod.			
9	Program: Rental Assistance Demonstration - 43	0 Turk Street		TOTAL
	Budget Reference Page No.(s)	7/4/47 0/20/40	7/4/40 0/20/40	7/4/47 6/20/40
12	Program Term Human Services Agency Expenditures	7/1/17-6/30/18	7/1/18-6/30/19	7/1/17-6/30/19
-	Salaries & Benefits	¢o	¢0	02
	Operating Expense	\$0 \$60,929	\$0 \$60,929	\$0 \$121,858
	Capital Expenditure	\$00,929	\$00,929	<u>121,030</u> \$0
	Subtotal	\$60,929	\$60,929	\$121,858
-	Indirect Percentage (%)	4.5%	4.5%	4.5%
	Indirect Cost (Line 16 X Line 17)	\$2,742	\$2,742	\$5.484
	Total HSA Expenditures	\$63,671	\$63,671	\$127,342
20	Developer Match Expenditures	¢00,011	¢00,01 1	¢:=:;e:=
_	Salaries & Benefits	\$0	\$0	\$0
	Operating Expense	\$77,512	\$77,512	\$155,024
	Capital Expenditure	0	0	\$0
	Subtotal	\$77,512	\$77,512	\$155,024
25	Indirect Percentage (%)	4.5%	4.5%	4.5%
	Indirect Cost (Line 16 X Line 17)	\$3,488	\$3,488	\$6,976
27	Total Developer Expenditures	\$81,000	\$81,000	\$162,000
28				
29	Total HSA and Developer Expenditures	\$144,671	\$144,671	\$289,342
30	HSA Revenues			
31	Local General Fund	\$63,671	\$63,671	\$127,342
32				
33				
34				
35				
36 37		-		
38				
39	TOTAL HSA REVENUES	¢60 671	\$63,671	¢107 010
39 40	Developer Revenues	\$63,671	φ03,07 I	\$127,342
40	Developer Revenues	\$81,000	\$81,000	\$162,000
41		φ01,000	φ01,000	φ102,000
43				
44				
45	Total Developer Revenues	\$81,000	\$81,000	\$162,000
46	Total Revenues	\$144,671	\$144,671	\$289,342
47	Full Time Equivalent (FTE)	÷ ,	Ŧ)	*,- ·
49	Prepared by: Paul Sussman	Т	elephone No. D	Date
50	HSA-CO Review Signature:			
E 4	-			
51 52	HSA #1			
52				

			•	-			
1	A	В	С	D	E	F G	H I Appendix B-2, Page 2
2	1					Do	cument Date: 4/13/2017
3	Tenderloin Neighborh	ood Dovelor-	ont Corner	ation			
5			ion corpole				
6 7	4			000	rating Exponen	Detail	
7 8	1			Ope	rating Expense	Delali	
	1				Human Services	Human Services	
9	HSA Expanditure Cat	adony		TEDMA	Agency	Agency	TOTAL
	HSA Expenditure Cate	egory		IEKIVI	7/1/17-6/30/18	7/1/18-6/30/19	7/1/17-6/30/19
	Rental of Property						
	Telephone						
	Office Supplies, Posta						
	Maintenance Supplies						
	Printing and Reproduc	ction				·	
	Insurance						
	Staff Travel (local) &	Fraining					
18	Law Library						
19	Membership/Dues						
20	Rental of Equipment						
21	Senior Right Bulletin						
	Sub-Contractor (NCPI	HS)		_	60,929	60,929	121,858
23 24				-			
				-			
25 26	OTHER						
27				-			
28	l			-			
29 30	1			-			
31	1		E		\$60,929	\$60,929	\$121,858
32	1		-		φ00,023		
	Developer Match Ope	rating Expens	0				
	Rental of Property						
	Telephone	20					
	Office Supplies, Posta						
	Printing and Reproduc	ction					
	Insurance						
	Law Library						
	Membership/Dues						
	Rental of Equipment					·	
	Volunteer Expenses (Receptionist/ir	ntake)				
	Client Costs						
	Maintenance Supplies	and Repair					
	Utilities						
	Janitorial service & su	••					
47	Sub-Contractor (NCPI	HS)			77,512	77,512	155,024
48	4						
	TOTAL DEVELOPER	OPERATING	EXPENSE		\$77,512	\$77,512	\$155,024
50 51	TOTAL OPERATING	EXPENSE			\$138,441	\$138,441	\$276,882
52							
FO							
53 54	HSA #3						

APPENDIX A-3 – SERVICES TO BE PROVIDED THE TENDERLOIN NEIGHBORHOOD DEVELOPMENT CORPORATION

RAD Housing Support Services at Rosa Parks Senior Housing (1251 Turk Street) July 1, 2017 to June 30, 2019

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services, a division of the Human Services Agency
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that results in substantial functional limitations in one or more major life activity.
Grantee	Tenderloin Neighborhood Development Corporation
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older
Subcontractor	Northern California Presbyterian Homes and Services (NCPHS) will be contracted by the grantee and paid with grant funds to provide services and/or achieve service and outcome objectives as required by this grant.

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted housing development units at Rosa Parks Senior Housing (1251 Turk Street).

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities
 - Build tenant base
 - Develop neighborhood partnerships
- 2) Community Building
 - Facilitate community organizing and events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase access to information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities
- 3) Service Connection
 - Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will hire, train, and supervise 2.5 FTE (leveraged and/or grant funded) to provide services at Rosa Parks Senior Housing (1251 Turk Street) during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.

- Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.
- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.

- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.

Community Engagement:

• Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.

V. Location and Time of Services

Services will be provided at Rosa Parks Senior Housing (1251 Turk Street), Monday through Friday, during regular office hours of 8:30 a.m. to 5 p.m., excluding holidays.

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.
- Grantee will communicate and collaborate regularly with DAAS to help provide logistical and operational support to the program and to provide quality services to tenants.
- Grantee will work collaboratively with DAAS to strategize program direction and services provision.
- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
- Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.

VII. Service Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Grantee will have individual and group service encounters with at least 50% of the tenants per month.
- Grantee will provide to tenants a minimum of one (1) activity or event per week (or 52 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel "strongly" or "very strongly" about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: "How strongly do you feel about being connected and involved in the tenant/resident community at [site]? The options should be "Very strongly", "Strongly", "Somewhat", "Not at all".
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will "agree" or "highly agree" that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: "Do you have better access to services that improve your health and wellness?" The options should be "Highly agree", "Agree", "Neutral", "Disagree", "Highly disagree".
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII - Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
 - Number and percentage of unduplicated tenants with individual and group service encounters.

- Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
- Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
 - Number and percentage of tenants who have rated overall service as "Excellent" or "Good" in Tenant Satisfaction Survey, and number and percentage of response rate.
 - Number and percentage of unduplicated tenants who were outreached to.
 - Number and percentage of households that have maintained or have obtained stable housing.
- C. Grantee will provide Ad Hoc reports as required by the Department.
- D. For assistance with reporting requirements or submission of reports, contact:

or

Carrie.Wong@sfgov.org Director, Long Term Care Operations Department of Aging and Adult Services

- A. <u>Program Monitoring</u>: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.
- B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	В	С	D
1	A	В	÷	ppendix B-3, Page 1
2				ppendix B-3, Page 1 nent Date: 4/13/2017
3	HUMAN SERVICES AGENCY			
4		BY PROGRAM	VI	
5	Contractor's Name		Contract	Term
6	Tenderloin Neighborhood Development Corp	poration	July 1, 2017-Ju	une 30. 2019
7	(Check One) New X Renewal		, , , , , , , , , , , , , , , , , , ,	
	,			
8	If modification, Effective Date of Mod. N	lo. of Mod.		
۵	Program: Rental Assistance Demonstration - Ro	nea Parke		TOTAL
				TOTAL
	Budget Reference Page No.(s)			
	Program Term	7/1/17-6/30/18	7/1/18-6/30/19	7/1/17-6/30/19
12	Human Services Agency Expenditures			
	Salaries & Benefits	\$0 \$107.052	\$0 \$107.050	\$0 \$254.506
	Operating Expense Capital Expenditure	\$127,253 \$0	\$127,253 \$0	\$254,506 \$0
	Subtotal	\$0 \$127,253	\$0 \$127,253	\$0 \$254,506
	Indirect Percentage (%)	4%	4%	4%
	Indirect Cost (Line 16 X Line 17)	4% \$5,090	4% \$5.090	4% \$10,180
	Total HSA Expenditures	\$132,343	\$132,343	\$264,686
20		\$102,040	φ102,040	φ204,000
_	Salaries & Benefits	\$0	\$0	\$0
	Operating Expense	\$155,769	\$155,769	\$311,538
	Capital Expenditure	\$0	\$0	\$0
	Subtotal	\$155,769	\$155,769	\$311,538
25	Indirect Percentage (%)	4%	4%	4%
	Indirect Cost (Line 16 X Line 17)	\$6,231	\$6,231	\$12,462
	Total Developer Expenditures	\$162,000	\$162,000	\$324,000
28	· ·			
29	Total HSA and Developer Expenditures	\$294,343	\$294,343	\$588,686
30	HSA Revenues			
31	Local General Fund	\$132,343	\$132,343	\$264,686
32				
33				
34				
35 36				
37				
38		† †		
39	TOTAL HSA REVENUES	\$132,343	\$132,343	\$264,686
40	Developer Revenues	ψ102,040	ψ102,040	Ψ204,000
40	Developer Match Funds	\$162,000	\$162,000	\$324,000
42		φ102,000	ψ10 <u>2</u> ,000	ψ02-1,000
43				
44				
45	Total Developer Revenues	\$162,000	\$162,000	\$324,000
46		┨─────┤		
47	Total Revenues	\$294,343	\$294,343	\$588,686
48	Full Time Equivalent (FTE)	2.50	2.50	
		•		
50	Prepared by:	Paul Sussman T	elephone No.	
51	HSA-CO Review Signature:			
52	HSA #1			
52				
00				

	А	В	С	D	E	TF	G	Н	
1		-	. · ·		_			Appendix B-3, Page 2	
2							Docu	ument Date: 4/13/2017	
4	Tenderloin Neighborhoo	od Developr	nent Corpoi	ation					
5 6									
7	Operating Expense Detail								
8				•					
9					Human Service Agency	s	Human Services Agency	TOTAL	
	HSA Expenditure Cated	<u>pory</u>		TERM			7/1/18-6/30/19	7/1/17 - 6/30/19	
11	Rental of Property								
	Telephone								
	Office Supplies, Postag	e							
	Maintenance Supplies a								
	Printing and Reproducti								
	Insurance						······································		
		ainina					·		
	Staff Travel (local) & Tr	annny							
	Law Library								
	Membership/Dues								
	Rental of Equipment								
21 22	Senior Right Bulletin Sub-Contractor (NCPH	S)			\$127,25	53	\$127,253	\$254,506	
22					φι27,23		φτ∠τ,205	φ204,300	
24				_		_			
25	OTHER								
26				_					
27 28				_					
29				_					
30									
31	TOTAL HSA OPERATI	NG EXPEN	SE		\$127,25	53	\$127,253	\$254,506	
32									
33	Developer Match Opera	ating Expense	se						
34	Rental of Property								
	Telephone								
36	Office Supplies, Postag	е							
	Printing and Reproducti								
	Insurance								
	Law Library								
	Membership/Dues					_			
	Rental of Equipment								
	Volunteer Expenses (Re	eceptionist/i	ntake)						
	Client Costs	000000000000000000000000000000000000000							
	Maintenance Supplies a	and Renair							
	Utilities								
	Janitorial service & sup	nlies							
	Sub-Contractor (NCPH				¢155 70	30	¢155 760	\$311,538	
		0)			\$155,76	50	\$155,769	φοτι,υσο	
48 49	TOTAL DEVELOPER (\$155,76	30	¢155 760	\$311,538	
49 50				-	φ100,7t	50	\$155,769	φοτι,υσο	
51 52	TOTAL OPERATING E	XPENSE			\$283,02	22	\$283,022	\$566,044	
	HSA #3								
54									

APPENDIX A-4 – SERVICES TO BE PROVIDED THE TENDERLOIN NEIGHBORHOOD DEVELOPMENT CORPORATION

RAD Housing Support Services at 320 & 330 Clementina Street July 1, 2017 to June 30, 2019

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services, a division of the Human Services Agency
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that results in substantial functional limitations in one or more major life activity.
Grantee	Tenderloin Neighborhood Development Corporation
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older
Subcontractor	Northern California Presbyterian Homes and Services (NCPHS) will be contracted by the grantee and paid with grant funds to provide services and/or achieve service and outcome objectives as required by this grant.

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted housing development units at 320 and 330 Clementina Street.

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities
 - Build tenant base
 - Develop neighborhood partnerships
- 2) Community Building
 - Facilitate community organizing and host events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase access to information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities
- 3) Service Connection
 - Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will hire, train, and supervise 3.75 FTE (leveraged and/or grant funded) to provide services at 320 and 330 Clementina Street during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.

- Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.
- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.

- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.

Community Engagement:

• Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.

V. Location and Time of Services

Services will be provided at 320 and 330 Clementina Street, Monday through Friday, during regular office hours of 8 a.m. to 4:30 p.m., excluding holidays.

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.
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- Grantee will work collaboratively with DAAS to strategize program direction and services provision.
- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
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VII. Service Objectives

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- Grantee will have individual and group service encounters with at least 50% of the tenants per month.
- Grantee will provide to tenants a minimum of one (1) activity or event per week (or 52 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel "strongly" or "very strongly" about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: "How strongly do you feel about being connected and involved in the tenant/resident community at [site]? The options should be "Very strongly", "Strongly", "Somewhat", "Not at all".
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will "agree" or "highly agree" that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: "Do you have better access to services that improve your health and wellness?" The options should be "Highly agree", "Agree", "Neutral", "Disagree", "Highly disagree".
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
 - Number and percentage of unduplicated tenants with individual and group service encounters.

- Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
- Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
 - Number and percentage of tenants who have rated overall service as "Excellent" or "Good" in Tenant Satisfaction Survey, and number and percentage of response rate.
 - Number and percentage of unduplicated tenants who were outreached to.
 - Number and percentage of households that have maintained or have obtained stable housing.
- C. Grantee will provide Ad Hoc reports as required by the Department.
- D. For assistance with reporting requirements or submission of reports, contact:

or

Carrie.Wong@sfgov.org Director, Long Term Care Operations Department of Aging and Adult Services

- A. <u>Program Monitoring</u>: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.
- B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

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1	A	В	C	D ppendix B-4, Page 1
2				nent Date: 4/13/2017
	HUMAN SERVICES AGENCY			
3		BY PROGRAM	GET SUMMAR	I
4				
5	Contractor's Name		Contra	ct Term
6	Tenderloin Neighborhood Development Corp	oration	July 1, 2017-	June 30, 2019
7	(Check One) NewX Renewal	Modification		
8	If modification, Effective Date of Mod.	o of Mod		
- 0	in modification, Encouve Date of Mod.			
9	Program: Rental Assistance Demonstration - Cle	ementina		TOTAL
10	Budget Reference Page No.(s)			
	Program Term	7/1/17-6/30/18	7/1/18-6/30/19	7/1/17-6/30/19
12	Human Services Agency Expenditures			
13	Salaries & Benefits	\$0	\$0	\$0
	Operating Expense	\$263,715	\$263,715	\$527,430
-	Capital Expenditure	\$0	\$0	\$0
	Subtotal	\$263,715	\$263,715	\$527,430
	Indirect Percentage (%)	4%	4%	4%
	Indirect Cost (Line 16 X Line 17)	\$10,549	\$10,549	\$21,098
	Total HSA Expenditures	\$274,264	\$274,264	\$548,528
20	Developer Match Expenditures	¢o	¢o	* ~
_	Salaries & Benefits	\$0 \$455.700	\$0 \$455.700	\$0
	Operating Expense	\$155,769	\$155,769	\$311,538
	Capital Expenditure Subtotal	\$0 \$155,769	\$0 \$155,769	\$0 \$311,538
	Indirect Percentage (%)			
	Indirect Cost (Line 16 X Line 17)	4% \$6.231	4% \$6,231	4% \$12,462
	Total Developer Expenditures	\$162,000	\$162,000	\$324,000
28		\$10 <u>2</u> ,000	¢102,000	QC2 1,000
-	Total HSA and Developer Expenditures	\$436,264	\$436,264	\$872,528
30	HSA Revenues			
31	Local General Fund	\$274,264	\$274,264	\$548,528
32				
33				
34				
35 36				
36 37				
38				
	TOTAL HSA REVENUES	\$274,264	\$274,264	\$548,528
40	Developer Revenues	ψ213,207	ΨΖΙ Τ,ΖΟΤ	φ0-10,020
40	Developer Match Funds	\$162,000	\$162,000	\$324,000
42		, ,	,,	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,
43				
44		A 400.000	6 400.000	#004.000
45	Total Developer Revenues	\$162,000	\$162,000	\$324,000
46	T. () D		A (C = C = C)	*-
47	Total Revenues	\$436,264	\$436,264	\$872,528
48	Full Time Equivalent (FTE): 3.75			
50	Prepared by:	Paul Sussman	Telephone No.	
		-		
	HSA-CO Review Signature:			
	HSA #1			
53				

	A	В	-	С	D	E	F	G	н
1		U		0	U	Ľ		-	Appendix B-4, Page 2
2								Doc	ument Date: 4/13/2017
4	Tenderloin Neighborh	ood Develop	ment	Corpor	ation				
5 6									
7					Оре	rating Expense	Det	ail	
8							- 1		
9						Human Services Agency		Human Services Agency	TOTAL
	HSA Expenditure Cat	egory			TERM	7/1/17-6/30/18		7/1/18-6/30/19	7/1/17-6/30/19
11	Rental of Property								
12	Telephone								
13	Office Supplies, Posta	age							
14	Maintenance Supplies	s and Repair							
15	Printing and Reprodu	ction							
16	Insurance								
17	Staff Travel (local) &	Training							
18	Law Library								
19	Membership/Dues								
20	Rental of Equipment								
21	Senior Right Bulletin								
	Sub-Contractor (NCP	HS)				\$263,71	5	\$263,715	\$527,430
23 24					-				
	OTHER				-		·		
26	OTTLER								
27					_				
28 29							— ·		
30					_				
31	TOTAL HSA OPERAT	TING EXPEN	ISE			\$263,71	5	\$263,715	\$527,430
32									
33	Developer Match Ope	erating Expen	ise						
34	Rental of Property								
35	Telephone						_		
	Office Supplies, Posta	age							
	Printing and Reprodu								
	Insurance								
	Law Library								
	Membership/Dues								
	Rental of Equipment								
	Volunteer Expenses (Receptionist	/intake	e)					
	Client Costs								
44	Maintenance Supplies	s and Repair							
45	Utilities								
46	Janitorial service & su	upplies							
47	Sub-Contractor (NCP	HS)				\$155,76	9	\$155,769	\$311,538
48									
	TOTAL DEVELOPER	OPERATING	G EXP	PENSE		\$155,76	9	\$155,769	\$311,538
50 51	TOTAL OPERATING	EXPENSE				\$419,48	4	\$419,484	\$838,968
52						ψτισ,το	<u> </u>	φ+10,+0+	
53 54	HSA #3								
- U T									