

Department of Benefits and Family Support	Ν	<b>IEMOR</b>	ANDUM	1		
Department of Disability and Aging Services	TO:	HUMAN S	ERVICES CO	OMMISSIC	DN	
Office of Early Care and Education	THROUGH:	TRENT RH	IORER, EXE	CUTIVE D	DIRECTOR	
	FROM:	PLANNIN	G, & PUBLIC	C RELATIO	OR, POLICY DNS R OF CONTR	
P.O. Box 7988 San Francisco, CA 94120-7988	DATE:	SEPTEMB	ER 16, 2022			EL
www.SFHSA.org	SUBJECT:	(NON-PRO DISABILIT	OFIT) FOR P TY & ADVO	ROVISION	N OF HOUSIN	١G
		<u>Current</u>	Modification	Revised	<u>Contingency</u>	<u>Total</u>
	GRANT TERM:	7/1/21- 6/30/23	9/1/22- 6/30/23	7/1/21- 6/30/23		
	GRANT AMOUNT:	\$1,954,757	\$432,429	\$2,387,186	5 \$238,719	\$2,625,905
	ANNUAL AMOUNT:	<u>FY 21/22</u>	<u>FY 22/23</u>			
<b>London Breed</b> Mayor	AMOUNI.	\$770,156	\$1,617,030			
<b>Trent Rhorer</b> Executive Director	Funding Source FUNDING:	<u>County</u> \$271,500	<u>State</u> \$2,115,686	Federal	Contingency \$238,719	<u>Total</u> \$2,625,905
	PERCENTAGE:	(NON-PROFIT) F         DISABILITY & A         SERVICES         Current       Modific         ERM:       7/1/21- 6/30/23       9/1/22         MOUNT:       \$1,954,757       \$432,44         FY 21/22       FY 22/22         \$770,156       \$1,617         purce       County \$271,500       \$tate \$2,115	89%			100%

The Homeless Benefits Linkages Program requests authorization to modify the existing grant with Bay Area Legal Aid for provision of HDAP Services for the period of September 1, 2022 through June 30, 2023, for an increased amount of \$432,429 plus a 10% contingency for a revised total amount not to exceed \$2,625,905. The purpose of this modification is to expand HDAP services. The Tipping Point Community (TPC) SSI Advocacy program is not being modified at this time.

	7/1/2021 to 6/30/2022	7/1/			
Program Name	Previously Revised	Original	Modification	Revised	Total
HDAP	\$498,656	\$1,184,601	\$432,429	\$1,617,030	\$2,115,686
TPC SSI Pilot	\$271,500	\$0	\$0	\$0	\$271,500
Grant Amount	\$770,156	\$1,184,601	\$432,429	\$1,617,030	\$2,387,186
Contingency 10%					\$238,719
TOTAL NTE:					\$2,625,905

#### Background

Many people experiencing homelessness who have a physical and/or mental health condition(s) that may qualify them for Supplemental Security Income (SSI) or Social Security Disability Insurance (SSDI) need help navigating the Social Security application process. SSI Advocacy assists clients through the process of applying for Social Security and/or the appeal process, as well as providing other social service supports, with the ultimate goal of obtaining an SSI/SSDI approval. The State has significantly increased funding for the Housing Disability and Advocacy Program (HDAP), leading to an opportunity to expand services to additional clients.

#### Services to be Provided

The original grant enabled the Grantee to help eligible people experiencing homelessness apply for and qualify for Social Security Disability Insurance benefits, Supplemental Security Income, and/or the state's Cash Assistance Program for Immigrants (CAPI) benefits. Legal and social supportive services included: direct outreach, SSI eligibility assessment, SSI application submission, reconsideration and hearing representation; housing assistance and housing navigation (in partnership with the Department of Homelessness and Supportive Housing (HSH); and case management.

With this modification, the Grantee will now be able to provide these same services to 282 eligible (up from 172 eligible before).

#### **Grantee Selection**

Grantee was selected through Request for Proposals #788, which was competitively bid in March 2018.

#### Funding

This modification of the HDAP program will be funded entirely through State grant funds from the California Department of Social Services. The TPC SSI Pilot program is funded by county General Funds. ATTACHMENTS Appendix A-2: HDAP Scope Appendix B-1b: HDAP Budget

# Appendix A-2: Services to be Provided Bay Area Legal Aid (BALA) Housing and Disability Advocacy Program (HDAP) July 1, 2021 to June 30, 2023 *Effective September 1, 2022*

## I. Purpose of Grant

The SSI legal and advocacy services provided by this program will assist individuals experiencing homelessness or at serious risk of homelessness connect to SSI/SSDI benefits. The Grantee will provide legal services and social worker services in order to help individuals participating in HDAP apply for and qualify for or regain Social Security Disability Insurance benefits, Supplemental Security Income, and / or the state's Cash Assistance Program for Immigrants (CAPI) benefits. Services funded through this grant will be made available in English, Spanish, Cantonese and Mandarin, and other languages as needed.

HDAP services are funded 100% by a grant from the California Department of Social Services.

# **II. Definitions**

CAAP	County Adult Assistance Programs
CalFresh	Formerly known as Food Stamps. A federal public assistance program that helps children and low-income households improve their diets by providing access to a nutritious diet.
САРІ	Cash Assistance Program for Immigrants. A state-funded program designed to provide monthly cash benefits to aged, blind, and disabled non-citizens who are ineligible for SSI/SSP solely due to their immigrant status
CARBON	Contract Administration, Reporting & Billing Online database
СВО	Community Based Organization
CDSS	California Department of Social Services
Grantee	Bay Area Legal Aid (Bay Legal)
HDAP	Housing Disability Advocacy Program
HSA, also Department	San Francisco Human Services Agency

Medi-Cal Free or low-cost health insurance for eligible individuals that comes with a range of health benefits and services

## **III.** Target Population

The target population for HDAP is residents of San Francisco who are experiencing homelessness or at risk of homelessness in a variety of locations, including congregate shelters, Navigation Centers, and Shelter-in-Place (SIP) hotels.

# **IV. Description of Services**

Grantee shall provide the following services during the term of this grant:

- A. Offer legal services and social work services to help individuals re-instate, apply for, appeal for, and qualify for Social Security Disability Insurance benefits, Supplemental Security Income, and/or the state's Cash Assistance Program for Immigrants (CAPI) benefits.
- B. Assist individuals in applying for federal or state disability benefits, as well as Social Security retirement benefits, if eligible.
- C. Provide legal assistance to advocate for submitted claims to be approved.
- D. Represent clients at all stages of the administrative and appeals process, from initial application, through reconsideration, administrative hearings, Appeals Council review, and federal district court. Legal services may also be provided to assist clients with reinstatements, recertifications, and advocating with SSA on clients' behalf.
- E. Coordinate services through SF City/County and CBO staff at all sites mutually agreed upon by HSA and The Department of Homelessness and Supportive Housing (HSH).
- F. Outreach to clients and coordinate services with case management, housing, and healthcare providers, including housing navigation and advocacy in collaboration with HSH Coordinated Entry.
- G. Grantee will provide attorney supervision and oversight of all staff, including law clerks.
- H. Grantee will provide support staff/translator capabilities.
- I. Health and Safety in COVID-19 Environment
  - a) Grantee will follow relevant guidance and protocols from the San Francisco Department of Public Health. See <u>https://www.sfcdcp.org/infectious-diseases-a-to-</u> z/coronavirus-2019-novel-coronavirus/
  - b) All Grantee staff and program participants taking part in in-person activities must observe social distancing protocols and must wear masks and/or other personal protective equipment appropriate to the activity.

#### V. Information and Referral

Through Grantee's connections to the community, Grantee will refer potential clients to CAAP, CalFresh, CAPI, Medi-Cal, or other HSA administered benefits clients to HSA to be screened for eligibility.

#### VI. Location and Time of Services

Services are provided Monday-Friday, during regular business hours (9 a.m. to 5 p.m.) at Bay Legal's San Francisco office (1800 Market Street, 3<sup>rd</sup> Floor). Grantee staff shall be available for appointments and client engagement interviews.

As appropriate, Grantee will provide services remotely via phone, email, and video conferencing.

#### VII. Service Objectives

On an annual basis, Grantee will meet the following service objectives:

A. Provide HDAP services to up to 282 individuals through June 30, 2023.

## VIII. Outcome Objectives

Given that the Social Security Administration is experiencing a significant backlog in the processing of claims, based on current SSA pace and capacity, Grantee will meet the following annual outcome objectives:

- A. 20% of HDAP cases are projected to resolve and close over the next year.
- B. 85% of closed cases will have a favorable outcome (approval of SSI application, increase in benefits, preservation of due process rights, exiting homelessness.)
  70% of closed cases will result in an approval for or increase in SSI/SSDI or CAPI benefits.
- C. In order to assess client satisfaction and to identify areas for project improvement, Grantee will send an evaluation to all participants to solicit feedback on the services provided upon closure of their case. Results from the returned evaluations will be compiled and reported to SF HSA at the end of the grant cycle, with a minimum of 90% of those responding will rate the accessibility, effectiveness of services, and overall satisfaction with services at least 3 or above on a five-point scale.

## **IX. Reporting Requirements**

- A. Quarterly Reports Grantee will provide data to SFHSA on a quarterly basis for HDAP clients that include the following information: intake date, client name, SSN, date application was submitted, application level, date of approval or final denial, reason for denial, date closed, closed reason, housing status at closure, and any other data required by CDSS.
- B. Quarterly Reports Grantee will summarize the contract activities, referencing the tasks as described in Section VIII & IX Service and Outcome Objectives.

- C. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VIII & IX Service and Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Annual Reports summarizing the contract activities will be submitted directly to Contracts Monitor by the 15th of the month following the end of the program year.
- D. Grantee will enter the mid-year SOGI aggregate data by January 15<sup>th</sup>, and annual SOGI aggregate data in the CARBON database by the 15th of the month following the end of the program year.
- E. E-mail communication that contains client confidential information (as agreed upon in writing by the client) shall be transmitted via Grantee's e-mail program through a secured method approved by HSA or by using ZixCorp.
- F. Grantee will provide Ad Hoc reports as required by the Department.
- G. For assistance with reporting requirements or submission of reports, contact:

Elizabeth.Leone@sfgov.org Senior Contract Manager, Office of Contract Management or Cindy.Ward@sfgov.org Program Manager, Homeless Benefits Linkages

## X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of client eligibility, and back-up documentation for reporting progress towards meeting service and outcome objectives.
- B. Fiscal Compliance and Contract Monitoring: 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	E	F			
1		1	-			lix B-1b, Page 1			
2									
3	HUMAN SERVICES AC	GENCY BUDGET SUM	IMARY						
4	1								
5	Name			Term	ı				
6	Bay Area Legal Aid			July 1, 2021 - Ju	ıne 30, 2023				
7	(Check One) New 🗆 Renewal _	Modification X							
8	If modification, Effective Date of Mod.	0/1/22 No. of Mod. 2							
9	Program: HDAP SSI Advocacy								
10	Budget Reference Page No.(s)	7/1/2021 to 6/30/2022		7/1/2022 to 6/30/2023		7/1/21-6/30/23			
11	Program Term	Budget	Budgeted	Modification	Revised	TOTAL			
12	Expenditures								
13	Salaries & Benefits	\$373,329	\$904,748	\$322,655	\$1,227,403	\$1,600,732			
	Operating Expense	\$51,515	\$112,275	\$38,011	\$150,286	\$201,801			
15	Subtotal	\$424,844	\$1,017,023	\$360,666	\$1,377,689	\$1,802,533			
16	Indirect Percentage (%)	14%	14%	14%	14%	14%			
17	Indirect Cost	\$68,597	\$167,578	\$59,763	\$227,341	\$295,938			
18	Capital Expenses	\$5,215	\$0	\$12,000	\$12,000	\$17,215			
19	Total Expenditures	\$498,656	\$1,184,601	\$432,429	\$1,617,030	\$2,115,686			
20	HSA Revenues	A 400.050	<b>*</b> 4 4 9 4 9 9 4	A 400 400	<b>0</b> 4 0 4 7 000	<b>1</b> 0 445 000			
21 22	State Funding	\$498,656	\$1,184,601	\$432,429	\$1,617,030	\$2,115,686			
22									
24									
25									
26									
27									
28									
29	TOTAL HSA REVENUES	\$498,656	\$1,184,601	\$432,429	\$1,617,030	\$2,115,686			
30	Other Revenues								
31									
32		<u>↓</u>							
33 34									
34									
	Total Revenues				\$0	\$0			
	Full Time Equivalent (FTE)								
39	Prepared by: Michelle Weger Telephone No.: 510-250-5243								
40	HSA-CO Review Signature:								
	HSA #1								

	A	В	С	D	E	F	G	н		
1	~	D	Ŭ	D			0		Appendi	x B-1b, Page 2
2	-									
4	Program Name: HDAP SSI Advocacy					Salaries & Bene	fits Detail			
5	(Same as Line 9 on HSA #1)									
6										
7										
8										
9 10	-									
11		Agency	Totals	HSA Pr	ogram	HDAP: 7/1/21-6/30/22	HDA	P: 7/1/2022 - 6/30	/2023	7/1/21-6/30/23
		Annual Full		% FTE funded by						
		TimeSalary		HSA	Adjusted					1
12	POSITION TITLE	for FTE	Total FTE	. ,	FTE	Budget	Budgeted	Modification	Revised	TOTAL
13	Managing Attorney - SSI (Weiss)	\$136,832	100%	2.000%	2.000%	\$5,412	\$2,737	\$0	\$2,737	\$8,149
14	Managing Attorney - SF Office (Joern)	\$130,007	100%	25.000%	25.000%	\$12,196	\$19,501	\$13,001	\$32,502	\$44,698
15	Supervising Attorney (Joern)***	\$109,220	100%	18.588%	18.588%	\$20,302				\$20,302
16	Supervising Attorney (Wolchansky)	\$116,532	100%	100.000%	100.000%	\$16,803	\$97,747	\$18,785	\$116,532	\$133,335
17	Supervising Attorney (Sussman)* - <i>starts</i> 9/6/22	\$116,523	100%	80.769%	80.769%		\$0	\$94,115	\$94,115	\$94,115
18	Staff Attorney (Wolchansky)***	\$104,735	100%	34.350%	34.350%	\$35,976				\$35,976
19	Staff Attorney (Mehlin)*	\$87,169	100%	86.538%	86.538%		\$78,551	(\$3,116)	\$75,435	\$75,435
20	Staff Attorney (Castro)	\$91,767	100%	100.000%	100.000%	\$49,823	\$73,594	\$18,173	\$91,767	\$141,590
21	Staff Attorney (Pappas)	\$90,363	100%	50.000%	50.000%	\$23,023	\$43,612	\$1,570	\$45,182	\$68,205
22	Staff Attorney (Maxson Velazquez)	\$88,764	100%	100.000%	100.000%	\$21,000	\$81,020	\$7,744	\$88,764	\$109,764
23	Staff Attorney (Blount)* - starts 9/9/22	\$93,549	100%	78.846%	78.846%	\$9,718	\$87,224	(\$13,464)	\$73,760	\$83,478
24	Staff Attorney (Hampton)* - starts 9/19/22	\$73,468	100%	76.923%	76.923%		\$0	\$56,514	\$56,514	\$56,514
25	Staff Attorney 3** - est start date 11/1/22	\$81,316	100%	36.538%	36.538%		\$0	\$29,712	\$29,712	\$29,712
26	Social Worker (Banks)	\$107,426	100%	100.000%	100.000%	\$51,639	\$93,981	\$13,445	\$107,426	\$159,065
27	Social Worker (Richard)	\$90,363	100%	100.000%	100.000%	\$15,146	\$78,764	\$11,599	\$90,363	\$105,509
28	Advocate (Tien)	\$98,982	100%	20.000%	20.000%	\$18,100	\$19,087	\$709	\$19,796	\$37,896
29	Support Staff (Li)	\$93,756	100%	30.000%	30.000%	\$13,828	\$11,496	\$16,631	\$28,127	\$41,955
30	Support Staff (Caballero)	\$73,632	100%	45.000%	45.000%	\$4,507	\$39,391	(\$6,257)	\$33,134	\$37,641
31					-					
32	Highlighted positions = staff expansion									
33	*Adjusted FTE reflects portion of year in full-time position				-					
34	**Adjusted FTE reflects portion of year in half-time position				-					
35	***FTEs reflect FY2122 salaries				-					
36					-					
37					-					
38					-					
39					-					
40	TOTALS		18.00	10.846	10.846	\$297,473	\$726,705	\$259,161	\$985,866	\$1,283,339
41 42	FRINGE BENEFIT RATE	24.50%	FY2122 b	enefits calcula	ited @ 25.5%	6; FY2223 @ 24.5%				
43	EMPLOYEE FRINGE BENEFITS					\$75,856	\$178,043	\$63,494	\$241,537	\$317,393
44 45	4									
46	TOTAL SALARIES & BENEFITS	\$0				\$373,329	\$904,748	\$322,655	\$1,227,403	\$1,600,732
	HSA #2						,,		. , ,	. ,,

	A	В	С	D	E	F	G	I J	K I	M
1									Appe	ndix B-1b, Page 3
2										
	Program Name: HD	AP SSI Advoc								
5	(Same as Line 9 on									
6				•		_				
7				Oper	rating Expen	se D	etail			
8 9										
10										
11 12				TERM	7/1/21-6/30/22			7/1/22-6/30/23		7/1/21-6/30/23
	Expenditure Catego	Г <u>У</u>			Budget		Budget	Modification	Revised	TOTAL
14	Rental of Property				\$32,641		\$71,399	\$29,465	\$100,864	\$133,505
15	Utilities (Elec, Water	, Gas, Phone,	Scavenger)		\$5,915		\$17,130	\$3,436	\$20,566	\$26,481
16	Office Supplies, Pos	tage			\$2,432		\$6,257	(\$208)	\$6,049	\$8,481
17	Building Maintenanc	e Supplies and	l Repair							
18	Printing and Reprod	uction								
19	Insurance				\$1,786		\$4,656	\$1,157	\$5,813	\$7,599
20	Rental of Equipment				\$2,556		\$6,233	(\$239)	\$5,994	\$8,550
21	Litigation costs (clier	nt pyschologica	l evaluations)		\$5,785		\$6,000	\$2,000	\$8,000	\$13,785
22	Local travel - staff/cli	ients			\$400		\$600	\$2,400	\$3,000	\$3,400
23										
24										
25										
26										
27										
28										
29	TOTAL OPERATIN	G EXPENSE			\$51,515		\$112,275	\$38,011	\$150,286	\$201,801
30										
31	HSA #3									

Program Name: HDAP SSI Advocacy (Same as Line 9 on HSA #1)

		Capital Expend (Equipment and Rer				
1		7/1/21-6/30/22		7/1/22-6/30/23		7/1/21-6/30/23
EQUI	PMENT	Budget	Budget	Modification	Revised	TOTAL
No.	ITEM/DESCRIPTION					
1	Docking station & external monitor	\$415				\$415
	laptops & peripherals	\$4,800				\$4,800
	tech packages (laptop & peripherals)		\$0	\$12,000	\$12,000	\$12,000
TOTAL	EQUIPMENT COST	\$5,215	\$0	\$12,000	\$12,000	\$17,215
REM	ODELING					
Descript	tion:					
TOTAL	REMODELING COST					
		\$5,215	\$0	\$12,000	\$12,000	\$17,215
(Equipm HSA #4	nent and Remodeling Cost)				11/15/2007	1/0/1900