



MEMORANDUM

TO: AGING & ADULT SERVICES COMMISSION

THROUGH: SHIREEN MCSPADDEN, EXECUTIVE DIRECTOR

FROM: CINDY KAUFFMAN, DEPUTY DIRECTOR
JOHN TSUTAKAWA, DIRECTOR OF CONTRACTS

DATE: DECEMBER 5, 2018

SUBJECT: GRANT RENEWAL: VARIOUS AGENCIES (NON-PROFIT) FOR THE PROVISION OF THE RESIDENTIAL ASSISTANCE DEMONSTRATION (RAD) PROGRAM

GRANT TERM:	<u>Current</u> 7/1/17- 6/30/19	<u>Renewal</u> 7/1/19- 6/30/24	<u>Contingency</u>	<u>Total</u>
GRANT AMOUNT:	\$3,360,801	\$8,505,730	\$850,573	\$9,356,303
FUNDING SOURCE	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u> <u>Total</u>
FUNDING:	\$8,505,730	\$0	\$0	\$850,573 \$9,356,303
PERCENTAGE:	100%			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, 2019 to June 30, 2024 in an amount of \$8,505,730 plus a 10% contingency for a total amount not to exceed \$9,356,303 (please see table below). The purpose of the grants is to provide service connection to older adults and adults with disabilities residing in San Francisco Rental 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, the City, including the Mayor's Office, the Mayor's Office of Housing and Community Development, and the City Administrator, met with SFHA and 72 different organizations over a 4 month period in early 2013 to re-envision the work of the SFHA. A financing strategy was developed 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 included the use of US Department of Housing and Urban Development (HUD) Project-Based Vouchers under the federal Rental Assistance Demonstration (RAD) program and the establishment of on-site services model in all RAD buildings.

For the RAD program, SFHA divided twenty-eight (28) of its public housing sites grouped into eight (8) neighborhood clusters in San Francisco. Sites range in size from 40 to 276 units, while the clusters themselves range in size from 276 to 575 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. older adults, adults with disabilities, or family households), in order to facilitate linkages with neighborhood-based services. Twenty (20) of the 28 sites are designated for older adults and adults with disabilities.

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 housing site, please refer to the attached Appendices A.

Grantee Performance

- **Fiscal Monitoring**

All 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 2018 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.

Developer Match: All RAD grantees are required to pay for services staff in their building operating budget to make sure program costs are embedded in building operations the same way property management is. The staffing requirement was set to a ratio of 1:75 (1 staff per 75 units).

Attachments

Table of Rental Assistance Demonstration Programs

Bridge Housing Corporation

Appendix A – Services to be Provided – 3850 18th Street

Appendix B – Program Budget – 3850 18th Street

Appendix B-Bridge/NCPHS subcontractor detail-18th Street

Appendix A – Services to be Provided – 462 Duboce Ave

Appendix B – Program Budget – 462 Duboce Ave

Appendix B-Bridge/NCPHS subcontractor detail- Duboce

Appendix A – Services to be Provided – Mission Dolores

Appendix B – Program Budget – Mission Dolores

Appendix B-Bridge/NCPHS subcontractor detail-Mission Dolores

Appendix A – Services to be Provided – 25 Sanchez Street

Appendix B – Program Budget – 25 Sanchez Street

Appendix B-Bridge/NCPHS subcontractor detail-Sanchez

Appendix A – Services to be Provided – 255 Woodside Ave

Appendix B – Program Budget – 255 Woodside Ave

Appendix B-Bridge/NCPHS subcontractor detail- Woodside

Chinatown Community Development Center

Appendix A – Services to be Provided – 227 Bay Street

Appendix B – Program Budget – 227 Bay Street

Appendix A – Services to be Provided – 990 Pacific Ave

Appendix B – Program Budget – 990 Pacific Ave

Community Housing Partnership

Appendix A – Services to be Provided – 1750 McAllister Street

Appendix B – Program Budget – 1750 McAllister Street

Appendix A – Services to be Provided – 666 Ellis Street

Appendix B – 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 – Services to be Provided – 345 Arguello Blvd

Appendix B – Program Budget – 345 Arguello Blvd

Appendix A – Services to be Provided – 491 31st Ave

Appendix B – Program Budget – 491 31st Ave

Appendix A – Services to be Provided – 1880 Pine Street

Appendix B – Program Budget – 1880 Pine Street

Appendix A – Services to be Provided – 1760 Bush Street

Appendix B – Program Budget – 1760 Bush Street

Appendix A – Services to be Provided – JFK Towers

Appendix B – Program Budget – JFK Towers

Appendix A – Services to be Provided – 2698 California Street

Appendix B – Program Budget – 2698 California Street

Tenderloin Neighborhood Development Corporation

Appendix A – Services to be Provided – 939-951 Eddy Street

Appendix B – Program Budget TNDC – 939-951 Eddy Street

Appendix B – TNDC/NCPHS subcontractor detail- 939-951 Eddy Street

Appendix A – Services to be Provided – 430 Turk Street

Appendix B – Program Budget TNDC – 430 Turk Street
 Appendix B – TNDC/NCPHS subcontractor detail- 430 Turk Street

Appendix A – Services to be Provided – 1251 Turk Street
 Appendix B – Program Budget TNDC – 1251 Turk Street
 Appendix B – TNDC/NCPHS subcontractor detail- 1251 Turk Street

Appendix A – Services to be Provided – 320-330 Clementina Street
 Appendix B – Program Budget TNDC – 320-330 Clementina Street
 Appendix B – TNDC/NCPHS subcontractor detail-320-330 Clementina Street

Rental Assistance Demonstration (RAD) Programs

Grantee	Site	Units	FY 18-19 Current Annual Amount	FY 19-20 Annual Amount	FY 19/20- 23/24 Grant Amount	Contingency	Total Amount
Bridge Housing Corporation	3850 18 th Street	107	\$97,346	\$97,346	\$486,730	\$48,673	\$535,403
Bridge Housing Corporation	462 Duboce Ave	42	\$50,101	\$50,101	\$250,505	\$25,051	\$275,556
Bridge Housing Corporation	Mission Dolores (1855 15 th Street)	92	\$67,682	\$67,682	\$338,410	\$33,841	\$372,251
Bridge Housing Corporation	25 Sanchez Street	90	\$67,157	\$67,157	\$335,785	\$33,579	\$369,364
Bridge Housing Corporation	255 Woodside Ave	110	\$98,135	\$98,135	\$490,675	\$49,068	\$539,743
Chinatown Community Development Center	227 Bay Street	51	\$52,465	\$52,465	\$262,325	\$26,233	\$288,558

Grantee	Site	Units	FY 18-19 Current Annual Amount	FY 19-20 Annual Amount	FY 19/20- 23/24 Grant Amount	Contingency	Total Amount
Chinatown Community Development Center	990 Pacific Ave	90	\$144,329	\$144,329	\$721,645	\$72,165	\$793,810
Community Housing Partnership	1750 McAllister Street	97	\$68,996	\$68,996	\$344,980	\$34,498	\$379,478
Community Housing Partnership	666 Ellis Street	100	\$69,784	\$69,784	\$348,920	\$34,892	\$383,812
GLIDE Community Housing Inc.	350 Ellis Street	96	\$68,733	\$68,733	\$343,665	\$34,367	\$378,032
Mercy Housing California	1760 Bush Street	108	\$97,609	\$97,609	\$488,045	\$48,805	\$536,850
Mercy Housing California	1880 Pine Street	113	\$98,923	\$98,923	\$494,615	\$49,462	\$544,077
Mercy Housing California	2698 California Street	40	\$49,576	\$49,576	\$247,880	\$24,788	\$272,668
Mercy Housing California	345 Arguello Blvd	69	\$35,918	\$35,918	\$179,590	\$17,959	\$197,549
Mercy Housing California	491 31 st Ave	75	\$37,494	\$37,494	\$187,470	\$18,747	\$206,217
Mercy Housing California	JFK Towers (2451 Sacramento Street)	98	\$69,258	\$69,258	\$346,290	\$34,629	\$380,919

Grantee	Site	Units	FY 18-19 Current Annual Amount	FY 19-20 Annual Amount	FY 19/20- 23/24 Grant Amount	Contingency	Total Amount
Tenderloin Neighborhood Development Corp	320-330 Clementina Street	276	\$288,149	\$288,149	\$1,440,745	\$144,075	\$1,584,820
Tenderloin Neighborhood Development Corp	430 Turk Street	89	\$66,894	\$66,894	\$334,470	\$33,447	\$367,917
Tenderloin Neighborhood Development Corp	939-951 Eddy Street	60	\$33,554	\$33,554	\$167,770	\$16,777	\$184,547
Tenderloin Neighborhood Development Corp	Rosa Parks (1251 Turk Street)	198	\$139,043	\$139,043	\$695,215	\$69,522	\$764,737
Total		2001	\$1,701,146	\$1,701,146	\$8,505,730	\$850,573	\$9,356,303

APPENDIX A

**AGREEMENT BETWEEN
THE SAN FRANCISCO DEPARTMENT OF AGING AND ADULT SERVICES
AND
BRIDGE HOUSING CORPORATION
RAD Housing Support Services at 3850 18th Street
Grant Term – July 1, 2019 through June 30, 2024**

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 older adults 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.
Economic Mobility Activities	Any activity that may improve and/or maintain tenants' financial stability (e.g. workshop on how to save money, learn how to balance a check, presentation about credit cards and debt, etc.)
Grantee	BRIDGE Housing Corporation
Health and Wellness Services	Any service that supports and/or promotes tenants' health and well-being (i.e. Adult Day Health, nutrition programs, free health screenings, DAAS services, etc.)
Older Adults	Person who is 62 years and older
RAD	Rental Assistance Demonstration

III. Target Population

Older adults 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 1.5 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 elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- Grantee will be compliant with laws related to confidentiality and privacy, including the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement. If Grantee is additionally a Business Associate, please refer to Business Associate 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 is responsible for program language capacity reflective of the tenant population served to best provide culturally appropriate services.
- Grantee will conduct an annual survey measuring program outcomes and whether tenants felt services effectively made an impact.
- 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 submit aggregate demographic information, including Sexual Orientation and Gender Identity (SOGI) data, annually to DAAS.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

Service objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- 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). Types of activities annually must be at least 10% trainings/workshops, 25% health and wellness related, and 65% all other.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will outreach to 100% unduplicated tenants annually.

VIII. Outcome Objectives

Outcome objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the annual survey will feel “strongly” or “very strongly” about being connected and involved in their tenant/resident community. Grantee may use the following standardized question: “How strongly do you feel 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 resources improving their health and wellness. At least 50% of unduplicated tenant participating in the annual survey will “agree” or “highly agree” that they have better access to resources that improve their health and wellness. Grantee may use the following standardized question: “Do you have better access to resources 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 have maintained or have obtained a 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 that were outreached annually.
 - 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 resources 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:

Esperanza.Zapien@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. Program Monitoring: 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. 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.

	A	B	C	D	E	F	G
1	Appendix B, Page 1						11.1.2018
2	Document Date:						
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY						
4	BY PROGRAM						
5	Contractor's Name				Contract Term		
6	BRIDGE Housing Corporation				July 1, 2019 - June 30, 2024		
7	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification						
8	If modification, Effective Date of Mod. No. of Mod.						
9	Program: Rental Assistance Demonstration - 3850 18th Street						TOTAL
10	Budget Reference Page No.(s)						
11	Program Term	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
12	Human Services Agency Expenditures						
13	Salaries & Benefits	\$0	\$0	\$0	\$0	\$0	\$0
14	Operating Expense	\$97,346	\$97,346	\$97,346	\$97,346	\$97,346	\$486,730
15	Capital Expenditure	0		\$0			\$0
16	Subtotal	\$97,346	\$97,346	\$97,346	\$97,346	\$97,346	\$486,730
17	Indirect Percentage (%)						
18	Indirect Cost (Line 16 X Line 17)						\$0
19	Total HSA Expenditures	\$97,346	\$97,346	\$97,346	\$97,346	\$97,346	\$486,730
20	Developer Match Expenditures						
21	Salaries & Benefits	\$0	\$0	\$0	\$0	\$0	\$0
22	Operating Expense	\$81,250	\$81,250	\$81,250	\$81,250	\$81,250	\$406,250
23	Capital Expenditure	\$0	\$0	\$0	\$0	\$0	\$0
24	Subtotal	\$81,250	\$81,250	\$81,250	\$81,250	\$81,250	\$406,250
25	Indirect Percentage (%)						
26	Indirect Cost (Line 16 X Line 17)						\$0
27	Total Developer Expenditures	\$81,250	\$81,250	\$81,250	\$81,250	\$81,250	\$406,250
28							
29	Total HSA and Developer Expenditures	\$178,596	\$178,596	\$178,596	\$178,596	\$178,596	\$892,980
30	HSA Revenues						
31	Local General Fund	\$97,346	\$97,346	\$97,346	\$97,346	\$97,346	\$486,730
32							
33							
34							
35							
36							
37							
38							
39	TOTAL HSA REVENUES	\$97,346	\$97,346	\$97,346	\$97,346	\$97,346	\$486,730
40	Developer Revenues						
41	Developer Match Funds	\$81,250	\$81,250	\$81,250	\$81,250	\$81,250	\$406,250
42							\$0
43							\$0
44							\$0
45	Total Developer Revenues	\$81,250	\$81,250	\$81,250	\$81,250	\$81,250	\$406,250
46	Total Revenues	\$178,596	\$178,596	\$178,596	\$178,596	\$178,596	\$892,980
47	Full Time Equivalent (FTE)						
49	Prepared by:	Susan Neufeld	Telephone No.	415-321-3526	Date		11.1.18
50	HSA-CO Review Signature: _____						
51	HSA #1						
52							

Contractor's Name: BRIDGE Housing Corporation

Operating Expense Detail

		Human Services Agency	TOTAL				
	TERM	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
9	HSA Expenditure Category						0
11	Rental of Property						\$0
12	Telephone and Office Furniture						\$0
13	Program/Office Supplies						\$0
14	Utilities (Electricity, Water, Sewer, Gas, Phone)						\$0
15	Printing and Reproduction						\$0
16	Insurance						\$0
17	Staff Travel (Local & Out of Town)						\$0
18	Law Library						\$0
19	Membership/Dues						\$0
20	Rental of Equipment						\$0
21	Senior Right Bulletin						\$0
22							\$0
23	Staff Training						\$0
24	Sub-Contractor (NCPHS)	\$97,346	\$97,346	\$97,346	\$97,346	\$97,346	\$486,730
25	OTHER						\$0
26	Language Line/Translation Services						\$0
27	Pangea/AASC Database						\$0
28	Educational Programs						\$0
29	Staff Recognition						\$0
30							\$0
31	TOTAL HSA OPERATING EXPENSE	\$97,346	\$97,346	\$97,346	\$97,346	\$97,346	\$486,730
32							
33	Developer Match Operating Expense						\$0
34	Staff Travel						\$0
35	Telephone and Furniture						\$0
36	Office Supplies, Postage						\$0
37	Printing and Reproduction						\$0
38	Program Supplies						\$0
39	Pangea/AASC Database						\$0
40	Membership/Dues						\$0
41	Rental of Equipment						\$0
42	Staff Recognition						\$0
43	Translation Services/Language Line						\$0
44	Educational Programs/LCSW/Other Outside Services						\$0
45	Charting						\$0
46	Staff Training						\$0
47	Sub-Contractor (NCPHS)	\$81,250	\$81,250	\$81,250	\$81,250	\$81,250	\$406,250
48							\$0
49	TOTAL DEVELOPER OPERATING EXPENSE	\$81,250	\$81,250	\$81,250	\$81,250	\$81,250	\$406,250
50							\$0
51	TOTAL OPERATING EXPENSE	\$178,596	\$178,596	\$178,596	\$178,596	\$178,596	\$892,980
52							
53	HSA #3						
54							

	A	B	C	D	E	F	G
1	Appendix B, Page 1						
2	Document Date: 11.13.18						
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY						
4	BY PROGRAM						
5	Sub Contractor's Name				Contract Term		
6	Bridge/ Subcontractor: Northern California Presbyterian Homes & Services				July 1, 2019 - June 30, 2024		
7	(Check One) New X Renewal Modification						
8	If modification, Effective Date of Mod. No. of Mod.						
9	Program: NCPHS DETAIL - 18th Street						TOTAL
10	Budget Reference Page No.(s)						
11	Program Term	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
12	Human Services Agency Expenditures						
13	Salaries & Benefits	\$68,792	\$68,792	\$68,792	\$68,792	\$68,792	\$343,960
14	Operating Expense	\$15,856	\$15,856	\$15,856	\$15,856	\$15,856	\$79,280
15	Capital Expenditure	0		\$0			\$0
16	Subtotal	\$84,648	\$84,648	\$84,648	\$84,648	\$84,648	\$423,240
17	Indirect Percentage (%)	15.00%	15.00%	15.00%	15.00%	15.00%	
18	Indirect Cost (Line 16 X Line 17)	\$12,698	\$12,698	\$12,698	\$12,698	\$12,698	\$63,490
19	Total HSA Expenditures	\$97,346	\$97,346	\$97,346	\$97,346	\$97,346	\$486,730
20	Developer Match Expenditures						
21	Salaries & Benefits	\$68,157	\$68,157	\$68,157	\$68,157	\$68,157	\$340,785
22	Operating Expense	\$2,495	\$2,495	\$2,495	\$2,495	\$2,495	\$12,475
23	Capital Expenditure	\$0		0			\$0
24	Subtotal	\$70,652	\$70,652	\$70,652	\$70,652	\$70,652	\$353,260
25	Indirect Percentage (%)	15.00%	15.00%	15.00%	15.00%	15.00%	
26	Indirect Cost (Line 16 X Line 17)	\$10,598	\$10,598	\$10,598	\$10,598	\$10,598	\$52,990
27	Total Developer Expenditures	\$81,250	\$81,250	\$81,250	\$81,250	\$81,250	\$406,250
28							
29	Total HSA and Developer Expenditures	\$178,596	\$178,596	\$178,596	\$178,596	\$178,596	\$892,980
30	HSA Revenues						
31	Local General Fund	\$97,346	\$97,346	\$97,346	\$97,346	\$97,346	\$486,730
32							\$0
33							\$0
34							\$0
35							\$0
36							\$0
37							\$0
38							\$0
39	TOTAL HSA REVENUES	\$97,346	\$97,346	\$97,346	\$97,346	\$97,346	\$486,730
40	Developer Revenues						
41	Developer Match Funds - Bridge	\$81,250	\$81,250	\$81,250	\$81,250	\$81,250	\$406,250
42							\$0
43							\$0
44							\$0
45	Total Developer Revenues	\$81,250	\$81,250	\$81,250	\$81,250	\$81,250	\$406,250
46	Total Revenues	\$178,596	\$178,596	\$178,596	\$178,596	\$178,596	\$892,980
47	Full Time Equivalent (FTE)						
49	Prepared by:	Susan Neufeld	Telephone No.	415-321-3526	Date		
50	HSA-CO Review Signature: _____						
51	HSA #1						
52							

Contractor's Name: BRIDGE Housing Corporation

Operating Expense Detail

HSA Expenditure Category	Human Services Agency	TOTAL				
	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
11 Rental of Property						\$0
12 Telephone and Office Furniture	\$0	\$0	\$0	\$0	\$0	\$0
13 Program/Office Supplies	\$11,358	\$11,358	\$11,358	\$11,358	\$11,358	\$58,790
14 Utilities (Electricity, Water, Sewer, Gas, Phone)	\$1,984	\$1,984	\$1,984	\$1,984	\$1,984	\$9,920
15 Printing and Reproduction	\$0	\$0	\$0	\$0	\$0	\$0
16 Insurance						\$0
17 Staff Travel (Local & Out of Town)	\$146	\$146	\$146	\$146	\$146	\$730
18 Law Library						\$0
19 Membership/Dues						\$0
20 Rental of Equipment						\$0
21 Senior Right Bulletin						\$0
22						\$0
23 Staff Training	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000	\$10,000
24 Sub-Contractor (NCPHS)						\$0
25 OTHER						\$0
26 Language Line/Translation Services	\$0	\$0	\$0	\$0	\$0	\$0
27 Pangea/AASC Database	\$0	\$0	\$0	\$0	\$0	\$0
28 Educational Programs	\$368	\$368	\$368	\$368	\$368	\$1,840
29 Staff Recognition						\$0
30						\$0
31 TOTAL HSA OPERATING EXPENSE	\$15,856	\$15,856	\$15,856	\$15,856	\$15,856	\$79,280
32						
33 Developer Match Operating Expense						\$0
34 Staff Travel						\$0
35 Telephone and Furniture	\$430	\$430	\$430	\$430	\$430	\$2,150
36 Office Supplies, Postage						\$0
37 Printing and Reproduction	\$0	\$0	\$0	\$0	\$0	\$0
38 Program Supplies	\$0	\$0	\$0	\$0	\$0	\$0
39 Staff Travel	\$0	\$0	\$0	\$0	\$0	\$0
40 Utilities	\$0	\$0	\$0	\$0	\$0	\$0
41 Rental of Equipment						\$0
42 Volunteer Expenses (Receptionist/Intake)						\$0
43 Translation Services/Language Line	\$0	\$0	\$0	\$0	\$0	\$0
44 Pangea/AASC Database	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$5,000
45 Charting						\$0
46 Staff Training	\$500	\$500	\$500	\$500	\$500	\$2,500
47 Educational Programs/LCSW/Other Outside Services	\$565	\$565	\$565	\$565	\$565	\$2,825
48						\$0
49 TOTAL DEVELOPER OPERATING EXPENSE	\$2,495	\$2,495	\$2,495	\$2,495	\$2,495	\$12,475
50						\$0
51 TOTAL OPERATING EXPENSE	\$18,351	\$18,351	\$18,351	\$18,351	\$18,351	\$91,755
52						
53 HSA #3						
54						

APPENDIX A

**AGREEMENT BETWEEN
THE SAN FRANCISCO DEPARTMENT OF AGING AND ADULT SERVICES
AND
BRIDGE HOUSING CORPORATION
RAD Housing Support Services at 462 Duboce Avenue
Grant Term – July 1, 2019 through June 30, 2024**

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 older adults 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.
Economic Mobility Activities	Any activity that may improve and/or maintain tenants' financial stability (e.g. workshop on how to save money, learn how to balance a check, presentation about credit cards and debt, etc.)
Grantee	BRIDGE Housing Corporation
Health and Wellness Services	Any service that supports and/or promotes tenants' health and well-being (i.e. Adult Day Health, nutrition programs, free health screenings, DAAS services, etc.)
Older Adults	Person who is 62 years and older
RAD	Rental Assistance Demonstration

III. Target Population

Older adults 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 elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- Grantee will be compliant with laws related to confidentiality and privacy, including the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement. If Grantee is additionally a Business Associate, please refer to Business Associate 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 is responsible for program language capacity reflective of the tenant population served to best provide culturally appropriate services.
- Grantee will conduct an annual survey measuring program outcomes and whether tenants felt services effectively made an impact.
- 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 submit aggregate demographic information, including Sexual Orientation and Gender Identity (SOGI) data, annually to DAAS.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

Service objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- 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). Types of activities annually must be at least 10% trainings/workshops, 25% health and wellness related, and 65% all other.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will outreach to 100% unduplicated tenants annually.

VIII. Outcome Objectives

Outcome objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the annual survey will feel “strongly” or “very strongly” about being connected and involved in their tenant/resident community. Grantee may use the following standardized question: “How strongly do you feel 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 resources improving their health and wellness. At least 50% of unduplicated tenant participating in the annual survey will “agree” or “highly agree” that they have better access to resources that improve their health and wellness. Grantee may use the following standardized question: “Do you have better access to resources 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 have maintained or have obtained a 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 that were outreached annually.
- 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 resources 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:

Esperanza.Zapien@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. Program Monitoring: 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. 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.

	A	B	C	D	E	F	G
1	Appendix B, Page 1						11.1.2018
2	Document Date:						
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY						
4	BY PROGRAM						
5	Contractor's Name				Contract Term		
6	BRIDGE Housing Corporation				July 1, 2019 - June 30, 2024		
7	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification						
8	If modification, Effective Date of Mod. No. of Mod.						
9	Program: Rental Assistance Demonstration - 462 Duboce Avenue						TOTAL
10	Budget Reference Page No.(s)						
11		7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
12	Human Services Agency Expenditures						
13	Salaries & Benefits	\$0	\$0	\$0	\$0	\$0	\$0
14	Operating Expense	\$50,101	\$50,101	\$50,101	\$50,101	\$50,101	\$250,505
15	Capital Expenditure	0	0	0	0	0	\$0
16	Subtotal	\$50,101	\$50,101	\$50,101	\$50,101	\$50,101	\$250,505
17	Indirect Percentage (%)						\$0
18	Indirect Cost (Line 16 X Line 17)						\$0
19	Total HSA Expenditures	\$50,101	\$50,101	\$50,101	\$50,101	\$50,101	\$250,505
20	Developer Match Expenditures						
21	Salaries & Benefits	\$0	\$0	\$0	\$0	\$0	\$0
22	Operating Expense	\$68,126	\$68,126	\$68,126	\$68,126	\$68,126	\$340,630
23	Capital Expenditure	\$0	\$0	\$0	\$0	\$0	\$0
24	Subtotal	\$68,126	\$68,126	\$68,126	\$68,126	\$68,126	\$340,630
25	Indirect Percentage (%)						\$0
26	Indirect Cost (Line 16 X Line 17)						\$0
27	Total Developer Expenditures	\$68,126	\$68,126	\$68,126	\$68,126	\$68,126	\$340,630
28							
29	Total HSA and Developer Expenditures	\$118,227	\$118,227	\$118,227	\$118,227	\$118,227	\$591,135
30	HSA Revenues						
31	Local General Fund	\$50,101	\$50,101	\$50,101	\$50,101	\$50,101	\$250,505
32							
33							
34							
35							
36							
37							
38							
39	TOTAL HSA REVENUES	\$50,101	\$50,101	\$50,101	\$50,101	\$50,101	\$250,505
40	Developer Revenues						
41	Developer Match Funds	\$68,126	\$68,126	\$68,126	\$68,126	\$68,126	\$340,630
42							
43							
44							
45	Total Developer Revenues	\$68,126	\$68,126	\$68,126	\$68,126	\$68,126	\$340,630
46	Total Revenues	\$118,227	\$118,227	\$118,227	\$118,227	\$118,227	\$591,135
47	Full Time Equivalent (FTE)						
49	Prepared by:	Susan Neufeld	Telephone No.	415-321-3526	Date		11.1.18
50	HSA-CO Review Signature: _____						
51	HSA #1						
52							

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Appendix B, Page 3														11.1.2018
2	Document Date:														
3	Contractor's Name: BRIDGE Housing Corporation														
4															
5															
6															
7	Operating Expense Detail														
8															
9															
10	HSA Expenditure Category	TERM	Human Services Agency								TOTAL				
11	Rental of Property	7/1/19-6/30/20													7/1/19-6/30/24
12	Telephone and Office Furniture														\$0
13	Office Supplies/Postage														\$0
14	Utilities (Electricity, Water, Sewer, Gas, Phone)														\$0
15	Printing and Reproduction														\$0
16	Insurance														\$0
17	Staff Travel (Local & Out of Town)														\$0
18	Law Library														\$0
19	Membership/Dues														\$0
20	Rental of Equipment														\$0
21	Senior Right Bulletin														\$0
22															\$0
23	Staff Training														\$0
24	Sub-Contractor (NCPHS)		\$50,101	\$50,101	\$50,101	\$50,101	\$50,101	\$50,101	\$50,101	\$50,101	\$50,101	\$50,101	\$50,101	\$50,101	\$250,505
25	OTHER														\$0
26	Language Line/Translation Services														\$0
27	Pangea/AASC Database														\$0
28	Program Supplies														\$0
29	Staff Recognition														\$0
30															\$0
31	TOTAL HSA OPERATING EXPENSE		\$50,101	\$50,101	\$50,101	\$50,101	\$50,101	\$50,101	\$50,101	\$50,101	\$50,101	\$50,101	\$50,101	\$50,101	\$250,505
32															
33	Developer Match Operating Expense														
34	Staff Travel														\$0
35	Telephone and Furniture														\$0
36	Office Supplies, Postage														\$0
37	Printing and Reproduction														\$0
38	Program Supplies														\$0
39	Pangea/AASC Database														\$0
40	Membership/Dues														\$0
41	Rental of Equipment														\$0
42	Staff Recognition														\$0
43	Translation Services/Language Line														\$0
44	Educational Programs/LCSW/Other Outside Services														\$0
45	Charting														\$0
46	Staff Training														\$0
47	Sub-Contractor (NCPHS)		\$68,126	\$68,126	\$68,126	\$68,126	\$68,126	\$68,126	\$68,126	\$68,126	\$68,126	\$68,126	\$68,126	\$68,126	\$340,630
48															\$0
49	TOTAL DEVELOPER OPERATING EXPENSE		\$68,126	\$68,126	\$68,126	\$68,126	\$68,126	\$68,126	\$68,126	\$68,126	\$68,126	\$68,126	\$68,126	\$68,126	\$340,630
50															\$0
51	TOTAL OPERATING EXPENSE		\$118,227	\$118,227	\$118,227	\$118,227	\$118,227	\$118,227	\$118,227	\$118,227	\$118,227	\$118,227	\$118,227	\$118,227	\$591,135
52															
53	HSA #3														
54															

	A	B	C	D	E	F	G
1	Appendix B, Page 1						
2	Document Date: 11.13.18						
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY						
4	BY PROGRAM						
5	Sub Contractor's Name			Contract Term			
6	Bridge/ Subcontractor: Northern California Presbyterian Homes & Services			July 1, 2019 - June 30, 2024			
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>						
8	If modification, Effective Date of Mod. No. of Mod.						
9	Program: NCPHS DETAIL - Duboce						TOTAL
10	Budget Reference Page No.(s)						
11	Program Term	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
12	Human Services Agency Expenditures						
13	Salaries & Benefits	\$38,850	\$38,850	\$38,850	\$38,850	\$38,850	\$194,250
14	Operating Expense	\$4,686	\$4,686	\$4,686	\$4,686	\$4,686	\$23,430
15	Capital Expenditure	\$0	\$0	\$0	\$0	\$0	\$0
16	Subtotal	\$43,536	\$43,536	\$43,536	\$43,536	\$43,536	\$217,680
17	Indirect Percentage (%)	15.08%	15.08%	15.08%	15.08%	15.08%	
18	Indirect Cost (Line 16 X Line 17)	\$6,565	\$6,565	\$6,565	\$6,565	\$6,565	\$32,825
19	Total HSA Expenditures	\$50,101	\$50,101	\$50,101	\$50,101	\$50,101	\$250,505
20	Developer Match Expenditures						
21	Salaries & Benefits	\$54,013	\$54,013	\$54,013	\$54,013	\$54,013	\$270,065
22	Operating Expense	\$5,205	\$5,205	\$5,205	\$5,205	\$5,205	\$26,025
23	Capital Expenditure	\$0	\$0	\$0	\$0	\$0	\$0
24	Subtotal	\$59,218	\$59,218	\$59,218	\$59,218	\$59,218	\$296,090
25	Indirect Percentage (%)	15.04%	15.00%	15.00%	15.00%	15.00%	
26	Indirect Cost (Line 16 X Line 17)	\$8,908	\$8,908	\$8,908	\$8,908	\$8,908	\$44,540
27	Total Developer Expenditures	\$68,126	\$68,126	\$68,126	\$68,126	\$68,126	\$340,630
28							
29	Total HSA and Developer Expenditures	\$118,227	\$118,227	\$118,227	\$118,227	\$118,227	\$591,135
30	HSA Revenues						
31	Local General Fund	\$50,101	\$50,101	\$50,101	\$50,101	\$50,101	\$250,505
32							\$0
33							\$0
34							\$0
35							\$0
36							\$0
37							\$0
38							\$0
39	TOTAL HSA REVENUES	\$50,101	\$50,101	\$50,101	\$50,101	\$50,101	\$250,505
40	Developer Revenues						
41	Developer Match Funds - Bridge	\$68,126	\$68,126	\$68,126	\$68,126	\$68,126	\$340,630
42							\$0
43							\$0
44							\$0
45	Total Developer Revenues	\$68,126	\$68,126	\$68,126	\$68,126	\$68,126	\$340,630
46	Total Revenues	\$118,227	\$118,227	\$118,227	\$118,227	\$118,227	\$591,135
47	Full Time Equivalent (FTE)						
49	Prepared by:	Susan Neufeld	Telephone No.	415-321-3526			Date
50	HSA-CO Review Signature:	_____					
51	HSA #1						
52							

Contractor's Name: BRIDGE Housing Corporation

Operating Expense Detail

HSA Expenditure Category	Human Services Agency	TOTAL				
	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
Rental of Property						0
Telephone and Office Furniture	\$45	\$45	\$45	\$45	\$45	\$225
Program/Office Supplies	\$0	\$0	\$0	\$0	\$0	\$0
Utilities (Electricity, Water, Sewer, Gas, Phone)	\$650	\$650	\$650	\$650	\$650	\$3,250
Printing and Reproduction	\$0	\$0	\$0	\$0	\$0	\$0
Insurance						\$0
Staff Travel (Local & Out of Town)	\$1,350	\$1,350	\$1,350	\$1,350	\$1,350	\$6,750
Law Library						\$0
Membership/Dues						\$0
Rental of Equipment						\$0
Senior Right Bulletin						\$0
Staff Training	\$1,841	\$1,841	\$1,841	\$1,841	\$1,841	\$9,205
Sub-Contractor (NCPHS)						\$0
OTHER						\$0
Language Line/Translation Services						\$0
Pangea/AASC Database	\$800	\$800	\$800	\$800	\$800	\$4,000
Educational Programs						\$0
Staff Recognition						\$0
TOTAL HSA OPERATING EXPENSE	\$4,686	\$4,686	\$4,686	\$4,686	\$4,686	\$23,430
Developer Match Operating Expense-Bridge						
Staff Travel						\$0
Telephone and Furniture	\$205	\$205	\$205	\$205	\$205	\$1,025
Office Supplies, Postage						\$0
Printing and Reproduction	\$0	\$0	\$0	\$0	\$0	\$0
Program Supplies	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000	\$25,000
Staff Travel	\$0	\$0	\$0	\$0	\$0	\$0
Utilities	\$0	\$0	\$0	\$0	\$0	\$0
Rental of Equipment						\$0
Volunteer Expenses (Receptionist/Intake)						\$0
Translation Services/Language Line	\$0	\$0	\$0	\$0	\$0	\$0
Educational Programs/LCSW/Other Outside Services						\$0
Charting						\$0
Staff Training	\$0	\$0	\$0	\$0	\$0	\$0
Sub-Contractor (NCPHS)						\$0
TOTAL DEVELOPER OPERATING EXPENSE	\$5,205	\$5,205	\$5,205	\$5,205	\$5,205	\$26,025
TOTAL OPERATING EXPENSE	\$9,891	\$9,891	\$9,891	\$9,891	\$9,891	\$49,455
HSA #3						

APPENDIX A

AGREEMENT BETWEEN THE SAN FRANCISCO DEPARTMENT OF AGING AND ADULT SERVICES AND BRIDGE HOUSING CORPORATION RAD Housing Support Services at Mission Dolores (1855 15th Street) Grant Term – July 1, 2019 through June 30, 2024

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 older adults 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.
Economic Mobility Activities	Any activity that may improve and/or maintain tenants' financial stability (e.g. workshop on how to save money, learn how to balance a check, presentation about credit cards and debt, etc.)
Grantee	BRIDGE Housing Corporation
Health and Wellness Services	Any service that supports and/or promotes tenants' health and well-being (i.e. Adult Day Health, nutrition programs, free health screenings, DAAS services, etc.)
Older Adults	Person who is 62 years and older
RAD	Rental Assistance Demonstration

III. Target Population

Older adults 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 elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- Grantee will be compliant with laws related to confidentiality and privacy, including the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement. If Grantee is additionally a Business Associate, please refer to Business Associate 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 is responsible for program language capacity reflective of the tenant population served to best provide culturally appropriate services.
- Grantee will conduct an annual survey measuring program outcomes and whether tenants felt services effectively made an impact.
- 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 submit aggregate demographic information, including Sexual Orientation and Gender Identity (SOGI) data, annually to DAAS.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

Service objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- 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). Types of activities annually must be at least 10% trainings/workshops, 25% health and wellness related, and 65% all other.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will outreach to 100% unduplicated tenants annually.

VIII. Outcome Objectives

Outcome objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the annual survey will feel “strongly” or “very strongly” about being connected and involved in their tenant/resident community. Grantee may use the following standardized question: “How strongly do you feel 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 resources improving their health and wellness. At least 50% of unduplicated tenant participating in the annual survey will “agree” or “highly agree” that they have better access to resources that improve their health and wellness. Grantee may use the following standardized question: “Do you have better access to resources 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 have maintained or have obtained a 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 that were outreached annually.
- 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 resources 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:

Esperanza.Zapien@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. Program Monitoring: 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. 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.

	A	B	C	D	E	F	G
1	Appendix B, Page 1						11.1.2018
2	Document Date:						
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY						
4	BY PROGRAM						
5	Contractor's Name			Contract Term			
6	BRIDGE Housing Corporation			July 1, 2019 - June 30, 2024			
7	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification						
8	If modification, Effective Date of Mod. No. of Mod.						
9	Program: Rental Assistance Demonstration - Mission Dolores						TOTAL
10	Budget Reference Page No.(s)						
11	Program Term	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
12	Human Services Agency Expenditures						
13	Salaries & Benefits	\$0	\$0	\$0	\$0	\$0	\$0
14	Operating Expense	\$67,682	\$67,682	\$67,682	67,682	67,682	\$338,410
15	Capital Expenditure	0	0	\$0	0	0	\$0
16	Subtotal	\$67,682	\$67,682	\$67,682	\$67,682	\$67,682	\$338,410
17	Indirect Percentage (%)						12.00%
18	Indirect Cost (Line 16 X Line 17)						\$0
19	Total HSA Expenditures	\$67,682	\$67,682	\$67,682	\$67,682	\$67,682	\$338,410
20	Developer Match Expenditures						
21	Salaries & Benefits	\$0	\$0	\$0	\$0	\$0	\$0
22	Operating Expense	\$81,250	\$81,250	81,250	81,250	81,250	\$406,250
23	Capital Expenditure	\$0	\$0	\$0	\$0	\$0	\$0
24	Subtotal	\$81,250	\$81,250	\$81,250	\$81,250	\$81,250	\$406,250
25	Indirect Percentage (%)						\$0
26	Indirect Cost (Line 16 X Line 17)						\$406,250
27	Total Developer Expenditures	\$81,250	\$81,250	\$81,250	\$81,250	\$81,250	\$406,250
28							
29	Total HSA and Developer Expenditures	\$148,932	\$148,932	\$148,932	\$148,932	\$148,932	\$744,660
30	HSA Revenues						
31	Local General Fund	\$67,682	\$67,682	\$67,682	\$67,682	\$67,682	\$338,410
32							
33							
34							
35							
36							
37							
38							
39	TOTAL HSA REVENUES	\$67,682	\$67,682	\$67,682	\$67,682	\$67,682	\$338,410
40	Developer Revenues						
41	Developer Match Funds	\$81,250	\$81,250	\$81,250	\$81,250	\$81,250	\$406,250
42							
43							
44							
45	Total Developer Revenues	\$81,250	\$81,250	\$81,250	\$81,250	\$81,250	\$406,250
46	Total Revenues	\$148,932	\$148,932	\$148,932	\$148,932	\$148,932	\$744,660
47	Full Time Equivalent (FTE)						
49	Prepared by:	Susan Neufeld	Telephone No.	415-321-3526	Date		11.1.18
50	HSA-CO Review Signature: _____						
51	HSA #1						
52							

Contractor's Name: BRIDGE Housing Corporation

Operating Expense Detail

HSA Expenditure Category	Human Services Agency	TOTAL				
	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
11 Rental of Property						\$0
12 Telephone and Office Furniture						\$0
13 Office Supplies/Postage						\$0
14 Utilities (Electricity, Water, Sewer, Gas, Phone)						\$0
15 Printing and Reproduction						\$0
16 Insurance						\$0
17 Staff Travel (Local & Out of Town)						\$0
18 Law Library						\$0
19 Membership/Dues						\$0
20 Rental of Equipment						\$0
21 Senior Right Bulletin						\$0
22						\$0
23 Staff Training						\$338,410
24 Sub-Contractor (NCPHS)	\$67,682	\$67,682	\$67,682	\$67,682	\$67,682	\$0
25 OTHER						\$0
26 Language Line/Translation Services						\$0
27 Pangea/AASC Database						\$0
28 Program Supplies						\$0
29 Staff Recognition						\$0
30						\$338,410
31 TOTAL HSA OPERATING EXPENSE	\$67,682	\$67,682	\$67,682	\$67,682	\$67,682	
32						
33 Developer Match Operating Expense						\$0
34 Staff Travel						\$0
35 Telephone and Furniture						\$0
36 Office Supplies, Postage						\$0
37 Printing and Reproduction						\$0
38 Program Supplies						\$0
39 Pangea/AASC Database						\$0
40 Membership/Dues						\$0
41 Rental of Equipment						\$0
42 Staff Recognition						\$0
43 Translation Services/Language Line						\$0
44 Educational Programs/LCSW/Other Outside Services						\$0
45 Charting						\$0
46 Staff Training						\$408,250
47 Sub-Contractor (NCPHS)	\$81,250	\$81,250	\$81,250	\$81,250	\$81,250	\$0
48						\$408,250
49 TOTAL DEVELOPER OPERATING EXPENSE	\$81,250	\$81,250	\$81,250	\$81,250	\$81,250	\$0
50						\$744,660
51 TOTAL OPERATING EXPENSE	\$148,932	\$148,932	\$148,932	\$148,932	\$148,932	
52						
53 HSA #3						
54						

	A	B	C	D	E	F	G
1	Appendix B, Page 1						
2	Document Date: 11.13.18						
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY						
4	BY PROGRAM						
5	Sub Contractor's Name				Contract Term		
6	Bridge/ Subcontractor: Northern California Presbyterian Homes & Services				July 1, 2019 - June 30, 2024		
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>						
8	If modification, Effective Date of Mod. No. of Mod.						
9	Program: NCPHS DETAIL - Mission Dolores						TOTAL
10	Budget Reference Page No.(s)						
11	Program Term						
12		7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
13	Human Services Agency Expenditures						
13	Salaries & Benefits	\$41,599	\$41,599	\$41,599	\$41,599	\$41,599	\$207,995
14	Operating Expense	\$17,255	\$17,255	\$17,255	\$17,255	\$17,255	\$86,275
15	Capital Expenditure	\$0	\$0	\$0	\$0	\$0	\$0
16	Subtotal	\$58,854	\$58,854	\$58,854	\$58,854	\$58,854	\$294,270
17	Indirect Percentage (%)	15.00%	15.00%	15.00%	15.00%	15.00%	
18	Indirect Cost (Line 16 X Line 17)	\$8,828	\$8,828	\$8,828	\$8,828	\$8,828	\$44,140
19	Total HSA Expenditures	\$67,682	\$67,682	\$67,682	\$67,682	\$67,682	\$338,410
20	Developer Match Expenditures						
21	Salaries & Benefits	\$63,756	\$63,756	\$63,756	\$63,756	\$63,756	\$318,780
22	Operating Expense	\$6,895	\$6,895	\$6,895	\$6,895	\$6,895	\$34,475
23	Capital Expenditure	\$0	\$0	\$0	\$0	\$0	\$0
24	Subtotal	\$70,651	\$70,651	\$70,651	\$70,651	\$70,651	\$353,255
25	Indirect Percentage (%)	15.00%	15.00%	15.00%	15.00%	15.00%	
26	Indirect Cost (Line 16 X Line 17)	\$10,599	\$10,599	\$10,599	\$10,599	\$10,599	\$52,995
27	Total Developer Expenditures	\$81,250	\$81,250	\$81,250	\$81,250	\$81,250	\$406,250
28							
29	Total HSA and Developer Expenditures	\$148,932	\$148,932	\$148,932	\$148,932	\$148,932	\$744,660
30	HSA Revenues						
31	Local General Fund	\$67,682	\$67,682	\$67,682	\$67,682	\$67,682	\$338,410
32							\$0
33							\$0
34							\$0
35							\$0
36							\$0
37							\$0
38							\$0
39	TOTAL HSA REVENUES	\$67,682	\$67,682	\$67,682	\$67,682	\$67,682	\$338,410
40	Developer Revenues						
41	Developer Match Funds - Bridge	\$81,250	\$81,250	\$81,250	\$81,250	\$81,250	\$406,250
42							\$0
43							\$0
44							\$0
45	Total Developer Revenues	\$81,250	\$81,250	\$81,250	\$81,250	\$81,250	\$406,250
46	Total Revenues	\$148,932	\$148,932	\$148,932	\$148,932	\$148,932	\$744,660
47	Full Time Equivalent (FTE)						
49	Prepared by:	Susan Neufeld	Telephone No.	415-321-3526	Date		
50	HSA-CO Review Signature: _____						
51	HSA #1						
52							

Contractor's Name: BRIDGE Housing Corporation

Operating Expense Detail

	Human Services Agency	TOTAL				
HSA Expenditure Category	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
11 Rental of Property						\$1,500
12 Telephone and Office Furniture	\$300	\$300	\$300	\$300	\$300	\$1,500
13 Program/Office Supplies	\$14,500	\$14,500	\$14,500	\$14,500	\$14,500	\$72,500
14 Utilities (Electricity, Water, Sewer, Gas, Phone)	\$0	\$0	\$0	\$0	\$0	\$0
15 Printing and Reproduction	\$520	\$520	\$520	\$520	\$520	\$2,600
16 Insurance						\$0
17 Staff Travel (Local & Out of Town)	\$370	\$370	\$370	\$370	\$370	\$1,850
18 Law Library						\$0
19 Membership/Dues						\$0
20 Rental of Equipment						\$0
21 Senior Right Bulletin						\$0
22						\$0
23 Staff Training						\$0
24 Sub-Contractor (NCPHS)						\$0
25 OTHER						\$1,500
26 Language Line/Translation Services	\$300	\$300	\$300	\$300	\$300	\$1,500
27 Pangea/AASC Database	\$800	\$800	\$800	\$800	\$800	\$4,000
28 Educational Programs	\$465	\$465	\$465	\$465	\$465	\$2,325
29 Staff Recognition						\$0
30						\$0
31 TOTAL HSA OPERATING EXPENSE	\$17,255	\$17,255	\$17,255	\$17,255	\$17,255	\$88,275
32						
33 Developer Match Operating Expense						\$0
34 Staff Travel						\$0
35 Telephone and Furniture	\$0	\$0	\$0	\$0	\$0	\$0
36 Office Supplies, Postage						\$0
37 Printing and Reproduction	\$0	\$0	\$0	\$0	\$0	\$0
38 Program Supplies	\$0	\$0	\$0	\$0	\$0	\$0
39 Staff Travel	\$0	\$0	\$0	\$0	\$0	\$0
40 Utilities	\$2,960	\$2,960	\$2,960	\$2,960	\$2,960	\$14,800
41 Rental of Equipment						\$0
42 Volunteer Expenses (Receptionist/Intake)						\$0
43 Translation Services/Language Line	\$0	\$0	\$0	\$0	\$0	\$0
44 Educational Programs/LCSW/Other Outside Services						\$0
45 Charting						\$0
46 Staff Training	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000	\$10,000
47 Educational Programs/LCSW/Other Outside Services	\$1,935	\$1,935	\$1,935	\$1,935	\$1,935	\$9,675
48						\$0
49 TOTAL DEVELOPER OPERATING EXPENSE	\$6,895	\$6,895	\$6,895	\$6,895	\$6,895	\$34,475
50						\$0
51 TOTAL OPERATING EXPENSE	\$24,150	\$24,150	\$24,150	\$24,150	\$24,150	\$120,750
52						
53 HSA #3						
54						

APPENDIX A

**AGREEMENT BETWEEN
THE SAN FRANCISCO DEPARTMENT OF AGING AND ADULT SERVICES
AND
BRIDGE HOUSING CORPORATION
RAD Housing Support Services at 25 Sanchez Street
Grant Term – July 1, 2019 through June 30, 2024**

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 older adults 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.
Economic Mobility Activities	Any activity that may improve and/or maintain tenants' financial stability (e.g. workshop on how to save money, learn how to balance a check, presentation about credit cards and debt, etc.)
Grantee	BRIDGE Housing Corporation
Health and Wellness Services	Any service that supports and/or promotes tenants' health and well-being (i.e. Adult Day Health, nutrition programs, free health screenings, DAAS services, etc.)
Older Adults	Person who is 62 years and older
RAD	Rental Assistance Demonstration

III. Target Population

Older adults 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 elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- Grantee will be compliant with laws related to confidentiality and privacy, including the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement. If Grantee is additionally a Business Associate, please refer to Business Associate 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 is responsible for program language capacity reflective of the tenant population served to best provide culturally appropriate services.
- Grantee will conduct an annual survey measuring program outcomes and whether tenants felt services effectively made an impact.
- 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 submit aggregate demographic information, including Sexual Orientation and Gender Identity (SOGI) data, annually to DAAS.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

Service objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- 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). Types of activities annually must be at least 10% trainings/workshops, 25% health and wellness related, and 65% all other.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will outreach to 100% unduplicated tenants annually.

VIII. Outcome Objectives

Outcome objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the annual survey will feel “strongly” or “very strongly” about being connected and involved in their tenant/resident community. Grantee may use the following standardized question: “How strongly do you feel 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 resources improving their health and wellness. At least 50% of unduplicated tenant participating in the annual survey will “agree” or “highly agree” that they have better access to resources that improve their health and wellness. Grantee may use the following standardized question: “Do you have better access to resources 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 have maintained or have obtained a 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 that were outreached annually.
 - 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 resources 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:

Esperanza.Zapien@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. Program Monitoring: 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. 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.

	A	B	C	D	E	F	G
1	Appendix B, Page 1						
2	Document Date:						11.1.2018
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY						
4	BY PROGRAM						
5	Contractor's Name				Contract Term		
6	BRIDGE Housing Corporation				July 1, 2019 - June 30, 2024		
7	(Check One) New <input type="checkbox"/> Renewal X <input type="checkbox"/> Modification						
8	If modification, Effective Date of Mod. No. of Mod.						
9	Program: Rental Assistance Demonstration - 25 Sanchez						TOTAL
10	Budget Reference Page No.(s)						
11	Program Term	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
12	Human Services Agency Expenditures						
13	Salaries & Benefits	\$0	\$0	\$0	\$0	\$0	\$0
14	Operating Expense	\$67,157	\$67,157	\$67,157	\$67,157	\$67,157	\$335,785
15	Capital Expenditure	0	0	0	0	0	0
16	Subtotal	\$67,157	\$67,157	\$67,157	\$67,157	\$67,157	\$335,785
17	Indirect Percentage (%)						
18	Indirect Cost (Line 16 X Line 17)						\$0
19	Total HSA Expenditures	\$67,157	\$67,157	\$67,157	\$67,157	\$67,157	\$335,785
20	Developer Match Expenditures						
21	Salaries & Benefits	\$0	\$0	\$0	\$0	\$0	\$0
22	Operating Expense	\$144,835	\$144,835	144,835	144,835	144,835	\$724,175
23	Capital Expenditure	\$0	\$0	\$0	\$0	\$0	\$0
24	Subtotal	\$144,835	\$144,835	\$144,835	\$144,835	\$144,835	\$724,175
25	Indirect Percentage (%)						
26	Indirect Cost (Line 16 X Line 17)						\$0
27	Total Developer Expenditures	\$144,835	\$144,835	\$144,835	\$144,835	\$144,835	\$724,175
28							
29	Total HSA and Developer Expenditures	\$211,992	\$211,992	\$211,992	\$211,992	\$211,992	\$1,059,960
30	HSA Revenues						
31	Local General Fund	\$67,157	\$67,157	\$67,157	\$67,157	\$67,157	\$335,785
32							
33							
34							
35							
36							
37							
38							
39	TOTAL HSA REVENUES	\$67,157	\$67,157	\$67,157	\$67,157	\$67,157	\$335,785
40	Developer Revenues						
41	Developer Match Funds	\$144,835	\$144,835	\$144,835	\$144,835	\$144,835	\$724,175
42							
43							
44							
45	Total Developer Revenues	\$144,835	\$144,835	\$144,835	\$144,835	\$144,835	\$724,175
46	Total Revenues	\$211,992	\$211,992	\$211,992	\$211,992	\$211,992	\$1,059,960
47	Full Time Equivalent (FTE)						
48	Prepared by:	Susan Neufeld	Telephone No.	415-321-3526	Date		11.1.18
49	HSA-CO Review Signature: _____						
50							
51	HSA #1						
52							

Contractor's Name: BRIDGE Housing Corporation

Operating Expense Detail

	Human Services Agency	Human Services Agency	Human Services Agency	Human Services Agency	Human Services Agency	TOTAL
	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
9						
10	HSA Expenditure Category					
11						\$0
12						\$0
13						\$0
14						\$0
15						\$0
16						\$0
17						\$0
18						\$0
19						\$0
20						\$0
21						\$0
22						\$0
23						\$0
24	\$67,157	\$67,157	\$67,157	\$67,157	\$67,157	\$335,785
25						\$0
26						\$0
27						\$0
28						\$0
29						\$0
30						\$0
31	\$67,157	\$67,157	\$67,157	\$67,157	\$67,157	\$335,785
32						
33	Developer Match Operating Expense					
34						\$0
35						\$0
36						\$0
37						\$0
38						\$0
39						\$0
40						\$0
41						\$0
42						\$0
43						\$100,000
44	\$20,000	\$20,000	\$20,000	\$20,000	\$20,000	\$0
45						\$0
46						\$624,175
47	\$124,835	\$124,835	\$124,835	\$124,835	\$124,835	\$0
48						\$724,175
49	\$144,835	\$144,835	\$144,835	\$144,835	\$144,835	\$1,059,960
50						
51	\$211,992	\$211,992	\$211,992	\$211,992	\$211,992	
52						
53	HSA #3					
54						

	A	B	C	D	E	F	G
1	Appendix B, Page 1						
2	Document Date: 11.13.18						
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY						
4	BY PROGRAM						
5	Sub Contractor's Name				Contract Term		
6	Bridge/ Subcontractor: Northern California Presbyterian Homes & Services				July 1, 2019 - June 30, 2024		
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>						
8	If modification, Effective Date of Mod. No. of Mod.						
9	Program: NCPHS DETAIL - Sanchez						TOTAL
10	Budget Reference Page No.(s)						
11	Program Term	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
12	Human Services Agency Expenditures						
13	Salaries & Benefits	\$52,913	\$52,913	\$52,913	\$52,913	\$52,913	\$264,566
14	Operating Expense	\$5,484	\$5,484	\$5,484	\$5,484	\$5,484	\$27,420
15	Capital Expenditure	0		\$0			\$0
16	Subtotal	\$58,397	\$58,397	\$58,397	\$58,397	\$58,397	\$291,985
17	Indirect Percentage (%)	15.00%	15.00%	15.00%	15.00%	15.00%	
18	Indirect Cost (Line 16 X Line 17)	\$8,760	\$8,760	\$8,760	\$8,760	\$8,760	\$43,800
19	Total HSA Expenditures	\$67,157	\$67,157	\$67,157	\$67,157	\$67,157	\$335,785
20	Developer Match Expenditures						
21	Salaries & Benefits	\$80,673	\$80,673	\$80,673	\$80,673	\$80,673	\$403,365
22	Operating Expense	\$44,879	\$44,879	\$44,879	\$44,879	\$44,879	\$224,395
23	Capital Expenditure	\$0		0			\$0
24	Subtotal	\$125,552	\$125,552	\$125,552	\$125,552	\$125,552	\$627,760
25	Indirect Percentage (%)	15.00%	15.00%	15.00%	15.00%	15.00%	
26	Indirect Cost (Line 16 X Line 17)	\$19,283	\$19,283	\$19,283	\$19,283	\$19,283	\$96,415
27	Total Developer Expenditures	\$144,835	\$144,835	\$144,835	\$144,835	\$144,835	\$724,175
28							
29	Total HSA and Developer Expenditures	\$211,992	\$211,992	\$211,992	\$211,992	\$211,992	\$1,059,960
30	HSA Revenues						
31	Local General Fund	\$67,157	\$67,157	\$67,157	\$67,157	\$67,157	\$335,785
32							
33							
34							
35							
36							
37							
38							
39	TOTAL HSA REVENUES	\$67,157	\$67,157	\$67,157	\$67,157	\$67,157	\$335,785
40	Developer Revenues						
41	Developer Match Funds - Bridge	\$144,835	\$144,835	\$144,835	\$144,835	\$144,835	\$724,175
42							
43							
44							
45	Total Developer Revenues	\$144,835	\$144,835	\$144,835	\$144,835	\$144,835	\$724,175
46	Total Revenues	\$211,992	\$211,992	\$211,992	\$211,992	\$211,992	\$1,059,960
47	Full Time Equivalent (FTE)						
49	Prepared by:	Susan Neufeld		Telephone No.	415-321-3526		Date
50	HSA-CO Review Signature: _____						
51	HSA #1						
52							

Contractor's Name: BRIDGE Housing Corporation

Operating Expense Detail

HSA Expenditure Category	Human Services Agency	TOTAL				
	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
11 Rental of Property						\$0
12 Telephone and Office Furniture	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000	\$10,000
13 Program/Office Supplies	\$0	\$0	\$0	\$0	\$0	\$0
14 Utilities (Electricity, Water, Sewer, Gas, Phone)	\$1,260	\$1,260	\$1,260	\$1,260	\$1,260	\$6,300
15 Printing and Reproduction	\$1,600	\$1,600	\$1,600	\$1,600	\$1,600	\$8,000
16 Insurance						\$0
17 Staff Travel (Local & Out of Town)	\$624	\$624	\$624	\$624	\$624	\$3,120
18 Law Library						\$0
19 Membership/Dues						\$0
20 Rental of Equipment						\$0
21 Senior Right Bulletin						\$0
22						\$0
23 Staff Training						\$0
24 Sub-Contractor (NCPHS)						\$0
25 OTHER						\$0
26 Language Line/Translation Services						\$0
27 Pangea/AASC Database						\$0
28 Educational Programs	\$0					\$0
29 Staff Recognition						\$0
30						\$0
31 TOTAL HSA OPERATING EXPENSE	\$5,484	\$5,484	\$5,484	\$5,484	\$5,484	\$27,420
32						
33 Developer Match Operating Expense						\$0
34 Staff Travel						\$0
35 Telephone and Furniture						\$0
36 Office Supplies, Postage						\$0
37 Printing and Reproduction						\$0
38 Program Supplies	\$21,700	\$21,700	\$21,700	\$21,700	\$21,700	\$108,500
39 Staff Travel	\$379	\$379	\$379	\$379	\$379	\$1,895
40 Program Evaluation (BRIDGE)	\$17,000	\$17,000	\$17,000	\$17,000	\$17,000	\$85,000
41 Rental of Equipment						\$0
42 Volunteer Expenses (Receptionist/Intake)						\$0
43 Translation Services/Language Line	\$800	\$800	\$800	\$800	\$800	\$4,000
44 Educational Programs/LCSW/Other Outside Services						\$0
45 Charting						\$0
46 Staff Training	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000	\$25,000
47 Sub-Contractor (NCPHS)						\$0
48						\$0
49 TOTAL DEVELOPER OPERATING EXPENSE	\$44,879	\$44,879	\$44,879	\$44,879	\$44,879	\$224,395
50						\$0
51 TOTAL OPERATING EXPENSE	\$50,363	\$50,363	\$50,363	\$50,363	\$50,363	\$251,815
52						
53 HSA #3						
54						

APPENDIX A

AGREEMENT BETWEEN
THE SAN FRANCISCO DEPARTMENT OF AGING AND ADULT SERVICES
AND
BRIDGE HOUSING CORPORATION
RAD Housing Support Services at 255 Woodside Avenue
Grant Term – July 1, 2019 through June 30, 2024

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 older adults 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.
Economic Mobility Activities	Any activity that may improve and/or maintain tenants' financial stability (e.g. workshop on how to save money, learn how to balance a check, presentation about credit cards and debt, etc.)
Grantee	BRIDGE Housing Corporation
Health and Wellness Services	Any service that supports and/or promotes tenants' health and well-being (i.e. Adult Day Health, nutrition programs, free health screenings, DAAS services, etc.)
Older Adults	Person who is 62 years and older
RAD	Rental Assistance Demonstration

III. Target Population

Older adults 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 elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- Grantee will be compliant with laws related to confidentiality and privacy, including the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement. If Grantee is additionally a Business Associate, please refer to Business Associate 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 is responsible for program language capacity reflective of the tenant population served to best provide culturally appropriate services.
- Grantee will conduct an annual survey measuring program outcomes and whether tenants felt services effectively made an impact.
- 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 submit aggregate demographic information, including Sexual Orientation and Gender Identity (SOGI) data, annually to DAAS.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

Service objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- 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). Types of activities annually must be at least 10% trainings/workshops, 25% health and wellness related, and 65% all other.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will outreach to 100% unduplicated tenants annually.

VIII. Outcome Objectives

Outcome objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the annual survey will feel “strongly” or “very strongly” about being connected and involved in their tenant/resident community. Grantee may use the following standardized question: “How strongly do you feel 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 resources improving their health and wellness. At least 50% of unduplicated tenant participating in the annual survey will “agree” or “highly agree” that they have better access to resources that improve their health and wellness. Grantee may use the following standardized question: “Do you have better access to resources 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 have maintained or have obtained a 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 that were outreached annually.
 - 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 resources 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:

Esperanza.Zapien@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. Program Monitoring: 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. 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.

	A	B	C	D	E	F	G
1	Appendix B, Page 1						11.1.2018
2	Document Date:						
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY						
4	BY PROGRAM						
5	Contractor's Name			Contract Term			
6	BRIDGE Housing Corporation			July 1, 2019 - June 30, 2024			
7	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification						
8	If modification, Effective Date of Mod. No. of Mod.						
9	Program: Rental Assistance Demonstration - Woodside						TOTAL
10	Budget Reference Page No.(s)						
11	Program Term	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
12	Human Services Agency Expenditures						
13	Salaries & Benefits	\$0	\$0	\$0	\$0	\$0	\$0
14	Operating Expense	\$98,135	\$98,135	\$98,135	\$98,135	\$98,135	\$490,675
15	Capital Expenditure	0	0	\$0	0	0	\$0
16	Subtotal	\$98,135	\$98,135	\$98,135	\$98,135	\$98,135	\$490,675
17	Indirect Percentage (%)						
18	Indirect Cost (Line 16 X Line 17)						
19	Total HSA Expenditures	\$98,135	\$98,135	\$98,135	\$98,135	\$98,135	\$490,675
20	Developer Match Expenditures						
21	Salaries & Benefits	\$0	\$0	\$0	\$0	\$0	\$0
22	Operating Expense	\$121,750	\$121,750	\$121,750	\$121,750	\$121,750	\$608,750
23	Capital Expenditure	\$0	\$0	\$0	\$0	\$0	\$0
24	Subtotal	\$121,750	\$121,750	\$121,750	\$121,750	\$121,750	\$608,750
25	Indirect Percentage (%)						
26	Indirect Cost (Line 16 X Line 17)						
27	Total Developer Expenditures	\$121,750	\$121,750	\$121,750	\$121,750	\$121,750	\$608,750
28							
29	Total HSA and Developer Expenditures	\$219,885	\$219,885	\$219,885	\$219,885	\$219,885	\$1,099,425
30	HSA Revenues						
31	Local General Fund	\$98,135	\$98,135	\$98,135	\$98,135	\$98,135	\$490,675
32							
33							
34							
35							
36							
37							
38							
39	TOTAL HSA REVENUES	\$98,135	\$98,135	\$98,135	\$98,135	\$98,135	\$490,675
40	Developer Revenues						
41	Developer Match Funds	\$121,750	\$121,750	\$121,750	\$121,750	\$121,750	\$608,750
42							
43							
44							
45	Total Developer Revenues	\$121,750	\$121,750	\$121,750	\$121,750	\$121,750	\$608,750
46	Total Revenues	\$219,885	\$219,885	\$219,885	\$219,885	\$219,885	\$1,099,425
47	Full Time Equivalent (FTE)						
49	Prepared by:	Susan Neufeld	Telephone No.	415-321-3526	Date		11.1.18
50	HSA-CO Review Signature: _____						
51	HSA #1						
52							

	A	B	C	D	E	F	G
1	Appendix B, Page 1						
2	Document Date: 11.13.18						
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY						
4	BY PROGRAM						
5	Sub Contractor's Name				Contract Term		
6	Bridge/ Subcontractor: Northern California Presbyterian Homes & Services				July 1, 2019 - June 30, 2024		
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>						
8	If modification, Effective Date of Mod. No. of Mod.						
9	Program: NCPHS DETAIL - Woodside						TOTAL
10	Budget Reference Page No.(s)						
11	Program Term						
12		7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
13	Human Services Agency Expenditures						
13	Salaries & Benefits	\$85,335	\$85,335	\$85,335	\$85,335	\$85,335	\$426,675
14	Operating Expense	\$0	\$0	\$0	\$0	\$0	\$0
15	Capital Expenditure	0	0	0	0	0	0
16	Subtotal	\$85,335	\$85,335	\$85,335	\$85,335	\$85,335	\$426,675
17	Indirect Percentage (%)	15.00%	15.00%	15.00%	15.00%	15.00%	
18	Indirect Cost (Line 16 X Line 17)	\$12,800	\$12,800	\$12,800	\$12,800	\$12,800	\$64,000
19	Total HSA Expenditures	\$98,135	\$98,135	\$98,135	\$98,135	\$98,135	\$490,675
20	Developer Match Expenditures						
21	Salaries & Benefits	\$61,248	\$61,248	\$61,248	\$61,248	\$61,248	\$306,240
22	Operating Expense	\$44,535	\$44,535	\$44,535	\$44,535	\$44,535	\$222,675
23	Capital Expenditure	\$0	\$0	\$0	\$0	\$0	\$0
24	Subtotal	\$105,783	\$105,783	\$105,783	\$105,783	\$105,783	\$528,915
25	Indirect Percentage (%)	15%	15%	15%	15%	15%	
26	Indirect Cost (Line 16 X Line 17)	\$15,967	\$15,967	\$15,967	\$15,967	\$15,967	\$79,835
27	Total Developer Expenditures	\$121,750	\$121,750	\$121,750	\$121,750	\$121,750	\$608,750
28							
29	Total HSA and Developer Expenditures	\$219,885	\$219,885	\$219,885	\$219,885	\$219,885	\$1,099,425
30	HSA Revenues						
31	Local General Fund	\$98,135	\$98,135	\$98,135	\$98,135	\$98,135	\$490,675
32							\$0
33							\$0
34							\$0
35							\$0
36							\$0
37							\$0
38							\$0
39	TOTAL HSA REVENUES	\$98,135	\$98,135	\$98,135	\$98,135	\$98,135	\$490,675
40	Developer Revenues						
41	Developer Match Funds -Bridge	\$121,750	\$121,750	\$121,750	\$121,750	\$121,750	\$608,750
42							\$0
43							\$0
44							\$0
45	Total Developer Revenues	\$121,750	\$121,750	\$121,750	\$121,750	\$121,750	\$608,750
46	Total Revenues	\$219,885	\$219,885	\$219,885	\$219,885	\$219,885	\$1,099,425
47	Full Time Equivalent (FTE)						
49	Prepared by:	Susan Neufeld	Telephone No.	415-321-3526			Date
50	HSA-CO Review Signature: _____						
51	HSA #1						
52							

Contractor's Name: BRIDGE Housing Corporation

Operating Expense Detail

HSA Expenditure Category	Human Services Agency	TOTAL				
	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
11 Rental of Property						\$0
12 Telephone and Office Furniture	\$0	\$0	\$0	\$0	\$0	\$0
13 Program/Office Supplies	\$0	\$0	\$0	\$0	\$0	\$0
14 Utilities (Electricity, Water, Sewer, Gas, Phone)	\$0	\$0	\$0	\$0	\$0	\$0
15 Printing and Reproduction	\$0	\$0	\$0	\$0	\$0	\$0
18 Insurance						\$0
17 Staff Travel (Local & Out of Town)	\$0	\$0	\$0	\$0	\$0	\$0
18 Law Library						\$0
19 Membership/Dues						\$0
20 Rental of Equipment						\$0
21 Senior Right Bulletin						\$0
22						\$0
23 Staff Training						\$0
24 Sub-Contractor (NCPHS)						\$0
25 OTHER						\$0
26 Language Line/Translation Services						\$0
27 Pangea/AASC Database						\$0
28 Educational Programs	\$0	\$0	\$0	\$0	\$0	\$0
29 Staff Recognition						\$0
30						\$0
31 TOTAL HSA OPERATING EXPENSE	\$0	\$0	\$0	\$0	\$0	\$0
32						
33 Developer Match Operating Expense						\$0
34 Staff Travel						\$4,325
35 Telephone and Furniture	\$865	\$865	\$865	\$865	\$865	\$0
36 Office Supplies, Postage						\$4,250
37 Printing and Reproduction	\$850	\$850	\$850	\$850	\$850	\$35,600
38 Program Supplies	\$7,120	\$7,120	\$7,120	\$7,120	\$7,120	\$3,500
39 Staff Travel	\$700	\$700	\$700	\$700	\$700	\$6,000
40 Utilities	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$0
41 Rental of Equipment						\$0
42 Volunteer Expenses (Receptionist/intake)						\$4,000
43 Translation Services/Language Line	\$800	\$800	\$800	\$800	\$800	\$0
44 Educational Programs/LCSW/Other Outside Services						\$130,000
45 Program Evaluation (BRIDGE)	\$26,000	\$26,000	\$26,000	\$26,000	\$26,000	\$35,000
46 Staff Training	\$7,000	\$7,000	\$7,000	\$7,000	\$7,000	\$0
47 Sub-Contractor (NCPHS)						\$0
48						\$222,675
49 TOTAL DEVELOPER OPERATING EXPENSE	\$44,535	\$44,535	\$44,535	\$44,535	\$44,535	\$0
50						\$222,675
51 TOTAL OPERATING EXPENSE	\$44,535	\$44,535	\$44,535	\$44,535	\$44,535	
52						
53 HSA #3						
54						

APPENDIX A

AGREEMENT BETWEEN THE SAN FRANCISCO DEPARTMENT OF AGING AND ADULT SERVICES AND CHINATOWN COMMUNITY DEVELOPMENT CENTER RAD Housing Support Services at 227 Bay Street Grant Term – July 1, 2019 through June 30, 2024

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 older adults 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.
Economic Mobility Activities	Any activity that may improve and/or maintain tenants' financial stability (e.g. workshop on how to save money, learn how to balance a check, presentation about credit cards and debt, etc.)
Grantee	Chinatown Community Development Center (Chinatown CDC)
Health and Wellness Services	Any service that supports and/or promotes tenants' health and well-being (i.e. Adult Day Health, nutrition programs, free health screenings, DAAS services, etc.)
Older Adults	Person who is 62 years and older

RAD Rental Assistance Demonstration

SOGI Sexual Orientation and Gender Identity

III. Target Population

Older adults 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 1.0 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.

- 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 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 elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- Grantee will be compliant with laws related to confidentiality and privacy, including the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement. If Grantee is additionally a Business Associate, please refer to Business Associate 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 is responsible for program language capacity reflective of the tenant population served to best provide culturally appropriate services.
- Grantee will conduct an annual survey measuring program outcomes and whether tenants felt services effectively made an impact.
- 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 submit aggregate demographic information, including Sexual Orientation and Gender Identity (SOGI) data, annually to DAAS.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

Service objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- 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). Types of activities annually must be at least 10% trainings/workshops, 25% health and wellness related, and 65% all other.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will outreach to 100% unduplicated tenants annually.

VIII. Outcome Objectives

Outcome objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the annual survey will feel “strongly” or “very strongly” about being connected and involved in their tenant/resident community. Grantee may use the following standardized question: “How strongly do you feel 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 resources improving their health and wellness. At least 50% of unduplicated tenant participating in the annual survey will “agree” or “highly agree” that they have better access to resources that improve their health and wellness. Grantee may use the following standardized question: “Do you have better access to resources 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 have maintained or have obtained a 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 that were outreached annually.
- 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 resources 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:

Esperanza.Zapien@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. Program Monitoring: 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. 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.

	A	B	C	D	E	F	G
1	Appendix B, Page 1						
2	Document Date: 11/10/2018						
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY						
4	BY PROGRAM						
5	Contractor's Name				Contract Term		
6	Chinatown Community Development Center				July 1, 2019 - June 30, 2024		
7	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification						
8	If modification, Effective Date of Mod. No. of Mod.				1.00		
9	Program: Rental Assistance Housing Support Services - 227 Bay						TOTAL
10	Budget Reference Page No.(s)						
11	Program Term	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
12	Human Services Agency Expenditures						
13	Salaries & Benefits	\$37,065	\$37,065	\$37,065	\$37,065	\$37,065	\$185,323
14	Operating Expense	\$8,557	\$8,557	\$8,557	\$8,557	\$8,557	\$42,786
15	Capital Expenditure	0		\$0			\$0
16	Subtotal	\$45,622	\$45,622	\$45,622	\$45,622	\$45,622	\$228,109
17	Indirect Percentage (%)	15.00%	15.00%	15.00%	15.00%	15.00%	
18	Indirect Cost (Line 16 X Line 17)	\$6,843	\$6,843	\$6,843	\$6,843	\$6,843	\$34,216
19	Total HSA Expenditures	\$52,465	\$52,465	\$52,465	\$52,465	\$52,465	\$262,325
20	Developer Match Expenditures						
21	Salaries & Benefits	\$56,322	\$56,322	\$56,322	\$56,322	\$56,322	\$281,610
22	Operating Expense	\$8,700	\$8,700	\$8,700	\$8,700	\$8,700	\$43,500
23	Capital Expenditure	\$0		0			\$0
24	Subtotal	\$65,022	\$65,022	\$65,022	\$65,022	\$65,022	\$325,110
25	Indirect Percentage (%)	15.00%	15.00%	15.00%	15.00%	15.00%	
26	Indirect Cost (Line 16 X Line 17)	\$9,753	\$9,753	\$9,753	\$9,753	\$9,753	\$48,765
27	Total Developer Expenditures	\$74,775	\$74,775	\$74,775	\$74,775	\$74,775	\$373,875
28							
29	Total HSA and Developer Expenditures	\$127,240	\$127,240	\$127,240	\$127,240	\$127,240	\$636,200
30	HSA Revenues						
31	Local General Fund	\$52,465	\$52,465	\$52,465	\$52,465	\$52,465	\$262,325
32							\$0
33							\$0
34							\$0
35							\$0
36							\$0
37							\$0
38							\$0
39	TOTAL HSA REVENUES	\$52,465	\$52,465	\$52,465	\$52,465	\$52,465	\$262,325
40	Developer Revenues						
41	Developer Match Funds	\$74,775	\$74,775	\$74,775	\$74,775	\$74,775	\$373,875
42							\$0
43							\$0
44							\$0
45	Total Developer Revenues	\$74,775	\$74,775	\$74,775	\$74,775	\$74,775	\$373,875
46	Total Revenues	\$127,240	\$127,240	\$127,240	\$127,240	\$127,240	\$636,200
47	Full Time Equivalent (FTE)	1.38	1.38	1.38	1.38	1.38	
49	Prepared by: Wai Ching Kwan	Telephone No. 415-984-1459				Date 11/5/2018	
50	HSA-CO Review Signature: _____						
51	HSA #1						
52							

Contractor's Name: Chinatown Community Development Center

Operating Expense Detail

HSA Expenditure Category	Human Services Agency	TOTAL				
	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
Rental of Property	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	6,000
Telephone and Office Furniture	\$615	\$615	\$615	\$615	\$615	\$3,075
Program/Office Supplies	\$600	\$600	\$600	\$600	\$600	\$3,000
Utilities (Electricity, Water, Sewer, Gas, Phone)						\$0
Printing and Reproduction						\$0
Insurance						\$0
Staff Travel (Local & Out of Town)	\$242	\$242	\$242	\$242	\$242	\$1,211
Law Library						\$0
Membership/Dues						\$0
Rental of Equipment						\$0
Senior Right Bulletin						\$0
Staff Training						\$0
Sub-Contractor (NCPHS)						\$0
OTHER						\$0
Tenant Activities	\$5,900	\$5,900	\$5,900	\$5,900	\$5,900	\$29,500
						\$0
						\$0
						\$0
						\$0
TOTAL HSA OPERATING EXPENSE	\$8,557	\$8,557	\$8,557	\$8,557	\$8,557	\$42,786
Developer Match Operating Expense						
Staff Travel	\$500	\$500	\$500	\$500	\$500	\$2,500
Telephone and Furniture	\$500	\$500	\$500	\$500	\$500	\$2,500
Office Supplies, Postage	\$500	\$500	\$500	\$500	\$500	\$2,500
Printing and Reproduction						\$0
Program Supplies	\$500	\$500	\$500	\$500	\$500	\$2,500
Law Library						\$0
Membership/Dues						\$0
Rental of Equipment						\$0
Volunteer Expenses (Receptionist/intake)						\$0
Translation Services/Language Line	\$500	\$500	\$500	\$500	\$500	\$2,500
Tenant Activities	\$4,200	\$4,200	\$4,200	\$4,200	\$4,200	\$21,000
Charling						\$0
Staff Training	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000	\$10,000
Sub-Contractor						\$0
						\$0
TOTAL DEVELOPER OPERATING EXPENSE	\$8,700	\$8,700	\$8,700	\$8,700	\$8,700	\$43,500
						\$0
TOTAL OPERATING EXPENSE	\$17,257	\$17,257	\$17,257	\$17,257	\$17,257	\$86,286
HSA #3						

APPENDIX A

**AGREEMENT BETWEEN
THE SAN FRANCISCO DEPARTMENT OF AGING AND ADULT SERVICES
AND
CHINATOWN COMMUNITY DEVELOPMENT CENTER
RAD Housing Support Services at 990 Pacific Avenue
Grant Term – July 1, 2019 through June 30, 2024**

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 older adults 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.
Economic Mobility Activities	Any activity that may improve and/or maintain tenants' financial stability (e.g. workshop on how to save money, learn how to balance a check, presentation about credit cards and debt, etc.)
Grantee	Chinatown Community Development Center (Chinatown CDC)
Health and Wellness Services	Any service that supports and/or promotes tenants' health and well-being (i.e. Adult Day Health, nutrition programs, free health screenings, DAAS services, etc.)
Older Adults	Person who is 62 years and older

RAD Rental Assistance Demonstration

SOGI Sexual Orientation and Gender Identity

III. Target Population

Older adults 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 2.0 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.

- 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 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 elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- Grantee will be compliant with laws related to confidentiality and privacy, including the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement. If Grantee is additionally a Business Associate, please refer to Business Associate 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 is responsible for program language capacity reflective of the tenant population served to best provide culturally appropriate services.
- Grantee will conduct an annual survey measuring program outcomes and whether tenants felt services effectively made an impact.
- 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 submit aggregate demographic information, including Sexual Orientation and Gender Identity (SOGI) data, annually to DAAS.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

Service objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- 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). Types of activities annually must be at least 10% trainings/workshops, 25% health and wellness related, and 65% all other.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will outreach to 100% unduplicated tenants annually.

VIII. Outcome Objectives

Outcome objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the annual survey will feel “strongly” or “very strongly” about being connected and involved in their tenant/resident community. Grantee may use the following standardized question: “How strongly do you feel 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 resources improving their health and wellness. At least 50% of unduplicated tenant participating in the annual survey will “agree” or “highly agree” that they have better access to resources that improve their health and wellness. Grantee may use the following standardized question: “Do you have better access to resources 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 have maintained or have obtained a 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 that were outreached annually.
- 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 resources 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:

Esperanza.Zapien@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. Program Monitoring: 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. 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.

	A	B	C	D	E	F	G
1	Appendix B, Page 1						
2	Document Date: 11/5/2018						
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY						
4	BY PROGRAM						
5	Contractor's Name			Contract Term			
6	Chinatown Community Development Center			July 1, 2019 - June 30, 2024			
7	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification						
8	If modification, Effective Date of Mod. No. of Mod.						
9	Program: Rental Assistance Housing Support Services - 990 Pacific						TOTAL
10	Budget Reference Page No.(s)						
11	Program Term	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
12	Human Services Agency Expenditures						
13	Salaries & Benefits	\$101,670	\$101,670	\$101,670	\$101,670	\$101,670	\$508,352
14	Operating Expense	\$23,833	\$23,833	\$23,833	\$23,833	\$23,833	\$119,166
15	Capital Expenditure	0		\$0			\$0
16	Subtotal	\$125,503	\$125,503	\$125,503	\$125,503	\$125,503	\$627,517
17	Indirect Percentage (%)	15.00%	15.00%	15.00%	15.00%	15.00%	
18	Indirect Cost (Line 16 X Line 17)	\$18,826	\$18,826	\$18,826	\$18,826	\$18,825.5	\$94,128
19	Total HSA Expenditures	\$144,329	\$144,329	\$144,329	\$144,329	\$144,329	\$721,645
20	Developer Match Expenditures						
21	Salaries & Benefits	\$135,628	\$135,628	\$135,628	\$135,628	\$135,628	\$678,140
22	Operating Expense	\$16,000	\$16,000	16,000	16,000	16,000	\$80,000
23	Capital Expenditure	\$0		0			\$0
24	Subtotal	\$151,628	\$151,628	\$151,628	\$151,628	\$151,628	\$758,140
25	Indirect Percentage (%)	15.00%	15.00%	15.00%	15.00%	15.00%	
26	Indirect Cost (Line 16 X Line 17)	\$22,744	\$22,744	\$22,744	\$22,744	\$22,744	\$113,721
27	Total Developer Expenditures	\$174,372	\$174,372	\$174,372	\$174,372	\$174,372	\$871,861
28							
29	Total HSA and Developer Expenditures	\$318,701	\$318,701	\$318,701	\$318,701	\$318,701	\$1,593,506
30	HSA Revenues						
31	Local General Fund	\$144,329	\$144,329	\$144,329	\$144,329	\$144,329	\$721,645
32							\$0
33							\$0
34							\$0
35							\$0
36							\$0
37							\$0
38							\$0
39	TOTAL HSA REVENUES	\$144,329	\$144,329	\$144,329	\$144,329	\$144,329	\$721,645
40	Developer Revenues						
41	Developer Match Funds	\$174,372	\$174,372	\$174,372	\$174,372	\$174,372	\$871,861
42							\$0
43							\$0
44							\$0
45	Total Developer Revenues	\$174,372	\$174,372	\$174,372	\$174,372	\$174,372	\$871,861
46	Total Revenues	\$318,701	\$318,701	\$318,701	\$318,701	\$318,701	\$1,593,506
47	Full Time Equivalent (FTE)	3.20	3.20	3.20	3.20	3.20	
49	Prepared by: Wai Ching Kwan	Telephone No. 415-984-1459				Date 11/1/2018	
50	HSA-CO Review Signature: _____						
51	HSA #1						
52							

Contractor's Name: Chinatown Community Development Center

Operating Expense Detail

	Human Services Agency	TOTAL				
HSA Expenditure Category	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
11 Rental of Property	\$5,600	\$5,600	\$5,600	\$5,600	\$5,600	28,000
12 Telephone and Office Furniture	\$1,500	\$1,500	\$1,500	\$1,500	\$1,500	\$7,500
13 Program/Office Supplies	\$2,400	\$2,400	\$2,400	\$2,400	\$2,400	\$12,000
14 Utilities (Electricity, Water, Sewer, Gas, Phone)	\$600	\$600	\$600	\$600	\$600	\$3,000
15 Printing and Reproduction						\$0
16 Insurance						\$0
17 Staff Travel (Local & Out of Town)	\$233	\$233	\$233	\$233	\$233	\$1,166
18 Law Library						\$0
19 Membership/Dues						\$0
20 Rental of Equipment						\$0
21 Senior Right Bulletin						\$0
22						\$0
23 Staff Training	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000	\$10,000
24 Professional Services /Consultant	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000	\$10,000
25 OTHER						\$0
26 Tenant Activities	\$9,200	\$9,200	\$9,200	\$9,200	\$9,200	\$46,000
27 Meeting expense	\$300	\$300	\$300	\$300	\$300	\$1,500
28						\$0
29						\$0
30						\$0
31 TOTAL HSA OPERATING EXPENSE	\$23,833	\$23,833	\$23,833	\$23,833	\$23,833	\$119,166
32						
33 Developer Match Operating Expense						
34 Staff Travel	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$5,000
35 Telephone and Furniture	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$5,000
36 Office Supplies, Postage	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$5,000
37 Printing and Reproduction						\$0
38 Program Supplies	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$5,000
39 Law Library						\$0
40 Membership/Dues						\$0
41 Rental of Equipment						\$0
42 Volunteer Expenses (Receptionist/intake)						\$0
43 Translation Services/Language Line	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$5,000
44 Tenant Activities	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000	\$25,000
45 Charting						\$0
46 Staff Training	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000	\$10,000
47 Professional Services /Consultant	\$4,000	\$4,000	\$4,000	\$4,000	\$4,000	\$20,000
48						\$0
49 TOTAL DEVELOPER OPERATING EXPENSE	\$16,000	\$16,000	\$16,000	\$16,000	\$16,000	\$80,000
50						\$0
51 TOTAL OPERATING EXPENSE	\$39,833	\$39,833	\$39,833	\$39,833	\$39,833	\$199,166
52						
53 HSA #3						
54						

APPENDIX A

AGREEMENT BETWEEN THE SAN FRANCISCO DEPARTMENT OF AGING AND ADULT SERVICES AND COMMUNITY HOUSING PARTNERSHIP RAD Housing Support Services at 1750 McAllister Street Grant Term – July 1, 2019 through June 30, 2024

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 older adults 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.
Economic Mobility Activities	Any activity that may improve and/or maintain tenants' financial stability (e.g. workshop on how to save money, learn how to balance a check, presentation about credit cards and debt, etc.)
Grantee	Community Housing Partnership
Health and Wellness Services	Any service that supports and/or promotes tenants' health and well-being (i.e. Adult Day Health, nutrition programs, free health screenings, DAAS services, etc.)
Older Adults	Person who is 62 years and older
RAD	Rental Assistance Demonstration

III. Target Population

Older adults 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 1.25 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.

- 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 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 elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- Grantee will be compliant with laws related to confidentiality and privacy, including the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement. If Grantee is additionally a Business Associate, please refer to Business Associate 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 is responsible for program language capacity reflective of the tenant population served to best provide culturally appropriate services.
- Grantee will conduct an annual survey measuring program outcomes and whether tenants felt services effectively made an impact.
- 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 submit aggregate demographic information, including Sexual Orientation and Gender Identity (SOGI) data, annually to DAAS.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

Service objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- 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). Types of activities annually must be at least 10% trainings/workshops, 25% health and wellness related, and 65% all other.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will outreach to 100% unduplicated tenants annually.

VIII. Outcome Objectives

Outcome objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the annual survey will feel “strongly” or “very strongly” about being connected and involved in their tenant/resident community. Grantee may use the following standardized question: “How strongly do you feel 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 resources improving their health and wellness. At least 50% of unduplicated tenant participating in the annual survey will “agree” or “highly agree” that they have better access to resources that improve their health and wellness. Grantee may use the following standardized question: “Do you have better access to resources 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 have maintained or have obtained a 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 that were outreached annually.
 - 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 resources 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:

Esperanza.Zapien@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. Program Monitoring: 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. 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.

	A	B	C	D	E	F	G
1	Appendix B, Page 1						
2	Document Date: 11/8/2018						
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY						
4	BY PROGRAM						
5	Contractor's Name				Contract Term		
6	Community Housing Partnership				July 1, 2019 - June 30, 2024		
7	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification						
8	If modification, Effective Date of Mod. No. of Mod.				1.00		
9	Program: Rental Assistance Demonstration - CHP 1750 McAllister						TOTAL
10	Budget Reference Page No.(s)						
11	Program Term	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
12	Human Services Agency Expenditures						
13	Salaries & Benefits	\$49,276	\$49,276	\$49,276	\$49,276	\$49,276	\$246,380
14	Operating Expense	\$10,721	\$10,721	\$10,721	\$10,721	\$10,721	\$53,605
15	Capital Expenditure	0		\$0			\$0
16	Subtotal	\$59,997	\$59,997	\$59,997	\$59,997	\$59,997	\$299,985
17	Indirect Percentage (%)	15.00%	15.00%	15.00%	15.00%	15.00%	
18	Indirect Cost (Line 16 X Line 17)	\$8,999	\$8,999	\$8,999	\$8,999	\$8,999	\$44,995
19	Total HSA Expenditures	\$68,996	\$68,996	\$68,996	\$68,996	\$68,996	\$344,980
20	Developer Match Expenditures						
21	Salaries & Benefits	\$50,503	\$50,503	\$50,503	\$50,503	\$50,503	\$252,515
22	Operating Expense	\$13,051	\$13,051	\$13,051	\$13,051	\$13,051	\$65,255
23	Capital Expenditure	\$0		0			\$0
24	Subtotal	\$63,554	\$63,554	\$63,554	\$63,554	\$63,554	\$317,770
25	Indirect Percentage (%)	15.00%	15.00%	15.00%	15.00%	15.00%	
26	Indirect Cost (Line 16 X Line 17)	\$9,533	\$9,533	\$9,533	\$9,533	\$9,533	\$47,665
27	Total Developer Expenditures	\$73,087	\$73,087	\$73,087	\$73,087	\$73,087	\$365,435
28							
29	Total HSA and Developer Expenditures	\$142,083	\$142,083	\$142,083	\$142,083	\$142,083	\$710,415
30	HSA Revenues						
31	Local General Fund	\$68,996	\$68,996	\$68,996	\$68,996	\$68,996	\$344,980
32							\$0
33							\$0
34							\$0
35							\$0
36							\$0
37							\$0
38							\$0
39	TOTAL HSA REVENUES	\$68,996	\$68,996	\$68,996	\$68,996	\$68,996	\$344,980
40	Developer Revenues						
41	Developer Match Funds	\$73,087	\$73,087	\$73,087	\$73,087	\$73,087	\$365,435
42							\$0
43							\$0
44							\$0
45	Total Developer Revenues	\$73,087	\$73,087	\$73,087	\$73,087	\$73,087	\$365,435
46	Total Revenues	\$142,083	\$142,083	\$142,083	\$142,083	\$142,083	\$710,415
47	Full Time Equivalent (FTE)	1.20		1.20			
49	Prepared by: Marietta Reagan, Staff Accountant II				Telephone No. (415)852-5314		Date: 11/8/2018
50	HSA-CO Review Signature: _____						
51	HSA #1						
52							

APPENDIX A

AGREEMENT BETWEEN THE SAN FRANCISCO DEPARTMENT OF AGING AND ADULT SERVICES AND COMMUNITY HOUSING PARTNERSHIP RAD Housing Support Services at 666 Ellis Street Grant Term – July 1, 2019 through June 30, 2024

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 older adults 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
Economic Mobility Activities	Any activity that may improve and/or maintain tenants' financial stability (e.g. workshop on how to save money, learn how to balance a check, presentation about credit cards and debt, etc.)
Grantee	Community Housing Partnership
Health and Wellness Services	Any service that supports and/or promotes tenants' health and well-being (i.e. Adult Day Health, nutrition programs, free health screenings, DAAS services, etc.)
Older Adults	Person who is 62 years and older
RAD	Rental Assistance Demonstration

III. Target Population

Older adults 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 1.25 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.

- 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 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 elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- Grantee will be compliant with laws related to confidentiality and privacy, including the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement. If Grantee is additionally a Business Associate, please refer to Business Associate 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 is responsible for program language capacity reflective of the tenant population served to best provide culturally appropriate services.
- Grantee will conduct an annual survey measuring program outcomes and whether tenants felt services effectively made an impact.
- 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 submit aggregate demographic information, including Sexual Orientation and Gender Identity (SOGI) data, annually to DAAS.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

Service objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- 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). Types of activities annually must be at least 10% trainings/workshops, 25% health and wellness related, and 65% all other.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will outreach to 100% unduplicated tenants annually.

VIII. Outcome Objectives

Outcome objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the annual survey will feel “strongly” or “very strongly” about being connected and involved in their tenant/resident community. Grantee may use the following standardized question: “How strongly do you feel 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 resources improving their health and wellness. At least 50% of unduplicated tenant participating in the annual survey will “agree” or “highly agree” that they have better access to resources that improve their health and wellness. Grantee may use the following standardized question: “Do you have better access to resources 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 have maintained or have obtained a 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 that were outreached annually.
 - 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 resources 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:

Esperanza.Zapien@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. Program Monitoring: 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. 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.

	A	B	C	D	E	F	G
1	Appendix B, Page 1						
2	Document Date: 11/8/2018						
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY						
4	BY PROGRAM						
5	Contractor's Name			Contract Term			
6	Community Housing Partnership			July 1, 2019 - June 30, 2024			
7	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification <input type="checkbox"/>						
8	If modification, Effective Date of Mod. No. of Mod.						
9	Program: Rental Assistance Demonstration - CHP Seniors 666 Ellis						TOTAL
10	Budget Reference Page No.(s)						
11	Program Term	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
12	Human Services Agency Expenditures						
13	Salaries & Benefits	\$46,795	\$46,795	\$46,795	\$46,795	\$46,795	\$233,975
14	Operating Expense	\$13,887	\$13,887	\$13,887	\$13,887	\$13,887	\$69,435
15	Capital Expenditure	0		\$0			\$0
16	Subtotal	\$60,682	\$60,682	\$60,682	\$60,682	\$60,682	\$303,410
17	Indirect Percentage (%)	15.00%	15.00%	15.00%	15.00%	15.00%	
18	Indirect Cost (Line 16 X Line 17)	\$9,102	\$9,102	\$9,102	\$9,102	\$9,102	\$45,510
19	Total HSA Expenditures	\$69,784	\$69,784	\$69,784	\$69,784	\$69,784	\$348,920
20	Developer Match Expenditures						
21	Salaries & Benefits	\$56,984	\$56,984	\$56,984	\$56,984	\$56,984	\$284,920
22	Operating Expense	\$12,947	\$12,947	\$12,947	\$12,947	\$12,947	\$64,735
23	Capital Expenditure	\$0		0			\$0
24	Subtotal	\$69,931	\$69,931	\$69,931	\$69,931	\$69,931	\$349,655
25	Indirect Percentage (%)	15.00%	15.00%	15.00%	15.00%	15.00%	
26	Indirect Cost (Line 16 X Line 17)	\$10,490	\$10,490	\$10,490	\$10,490	\$10,490	\$52,450
27	Total Developer Expenditures	\$80,421	\$80,421	\$80,421	\$80,421	\$80,421	\$402,105
28							
29	Total HSA and Developer Expenditures	\$150,205	\$150,205	\$150,205	\$150,205	\$150,205	\$751,025
30	HSA Revenues						
31	Local General Fund	\$69,784	\$69,784	\$69,784	\$69,784	\$69,784	\$348,920
32							\$0
33							\$0
34							\$0
35							\$0
36							\$0
37							\$0
38							\$0
39	TOTAL HSA REVENUES	\$69,784	\$69,784	\$69,784	\$69,784	\$69,784	\$348,920
40	Developer Revenues						
41	Developer Match Funds	\$80,421	\$80,421	\$80,421	\$80,421	\$80,421	\$402,105
42							\$0
43							\$0
44							\$0
45	Total Developer Revenues	\$80,421	\$80,421	\$80,421	\$80,421	\$80,421	\$402,105
46	Total Revenues	\$150,205	\$150,205	\$150,205	\$150,205	\$150,205	\$751,025
47	Full Time Equivalent (FTE)	1.20		1.20			
49	Prepared by: Marietta Reagan, Staff Accountant II			Telephone No. (415)852-5314		Date: 11/8/2018	
50	HSA-CO Review Signature: _____						
51	HSA #1						
52							

Contractor's Name: Community Housing Partnership
 Program: Rental Assistance Demonstration - CHP Seniors 886 Ellis

Operating Expense Detail

HSA Expenditure Category	Human Services Agency	TOTAL				
	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
Rental of Property						\$0
Telephone and Office Furniture						\$0
Program/Office Supplies	\$4,366	\$4,366	\$4,366	\$4,366	\$4,366	\$21,830
Utilities (Electricity, Water, Sewer, Gas, Phone)						\$0
Printing and Reproduction						\$0
Insurance	\$289	\$289	\$289	\$289	\$289	\$1,445
Staff Travel (Local & Out of Town)						\$0
Law Library						\$0
Membership/Dues						\$0
Rental of Equipment	\$3,255	\$3,255	\$3,255	\$3,255	\$3,255	\$16,275
Senior Right Bulletin						\$0
Staff Training	\$4,000	\$4,000	\$4,000	\$4,000	\$4,000	\$20,000
Sub-Contractor (NCPHS)						\$0
OTHER						
Payroll Expenses	\$455	\$455	\$455	\$455	\$455	\$2,275
Audit/Accounting	\$248	\$248	\$248	\$248	\$248	\$1,240
Office Equipment Repair (IT Support)	\$1,046	\$1,046	\$1,046	\$1,046	\$1,046	\$5,230
Organizational Activities (staff)	\$228	\$228	\$228	\$228	\$228	\$1,140
Language Line/Translation Services						\$0
Pangea/AASC Database						\$0
Educational Programs						\$0
Staff Recognition						\$0
TOTAL HSA OPERATING EXPENSE	\$13,887	\$13,887	\$13,887	\$13,887	\$13,887	\$69,435
Developer Match Operating Expense						
Staff Travel	\$75	\$75	\$75	\$75	\$75	\$375
Payroll Expenses	\$441	\$441	\$441	\$441	\$441	\$2,205
Audit/Accounting	\$241	\$241	\$241	\$241	\$241	\$1,203
Office Equipment Repair (IT Support)	\$1,014	\$1,014	\$1,014	\$1,014	\$1,014	\$5,068
Organizational Activities (staff)	\$221	\$221	\$221	\$221	\$221	\$1,103
Insurance (allocated)	\$280	\$280	\$280	\$280	\$280	\$1,398
Tenant Projects/Activities	\$10,677	\$10,677	\$10,677	\$10,677	\$10,677	\$53,383
Telephone and Furniture						\$0
Office Supplies, Postage						\$0
Printing and Reproduction						\$0
Program Supplies						\$0
Law Library						\$0
Membership/Dues						\$0
Rental of Equipment						\$0
Volunteer Expenses (Receptionist/intake)						\$0
Translation Services/Language Line						\$0
Educational Programs/LCSW/Other Outside Services						\$0
Charting						\$0
Staff Training						\$0
Sub-Contractor (NCPHS)						\$0
TOTAL DEVELOPER OPERATING EXPENSE	\$12,947	\$12,947	\$12,947	\$12,947	\$12,947	\$64,735
TOTAL OPERATING EXPENSE	\$26,834	\$26,834	\$26,834	\$26,834	\$26,834	\$134,170
HSA #3						

APPENDIX A

**AGREEMENT BETWEEN
THE SAN FRANCISCO DEPARTMENT OF AGING AND ADULT SERVICES
AND
GLIDE COMMUNITY HOUSING
RAD Housing Support Services at 350 Ellis Street
Grant Term – July 1, 2019 through June 30, 2024**

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 older adults 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.
Economic Mobility Activities	Any activity that may improve and/or maintain tenants' financial stability (e.g. workshop on how to save money, learn how to balance a check, presentation about credit cards and debt, etc.)
Grantee	Glide Community Housing Inc.
Health and Wellness Services	Any service that supports and/or promotes tenants' health and well-being (i.e. Adult Day Health, nutrition programs, free health screenings, DAAS services, etc.)
Older Adults	Person who is 62 years and older
RAD	Rental Assistance Demonstration

III. Target Population

Older adults 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.
- 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 use 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 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 elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- Grantee will be compliant with laws related to confidentiality and privacy, including the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement. If Grantee is additionally a Business Associate, please refer to Business Associate 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 is responsible for program language capacity reflective of the tenant population served to best provide culturally appropriate services.
- Grantee will conduct an annual survey measuring program outcomes and whether tenants felt services effectively made an impact.
- 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 submit aggregate demographic information, including Sexual Orientation and Gender Identity (SOGI) data, annually to DAAS.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

Service objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- 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). Types of activities annually must be at least 10% trainings/workshops, 25% health and wellness related, and 65% all other.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will outreach to 100% unduplicated tenants annually.

VIII. Outcome Objectives

Outcome objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the annual survey will feel “strongly” or “very strongly” about being connected and involved in their tenant/resident community. Grantee may use the following standardized question: “How strongly do you feel 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 resources improving their health and wellness. At least 50% of unduplicated tenant participating in the annual survey will “agree” or “highly agree” that they have better access to resources that improve their health and wellness. Grantee may use the following standardized question: “Do you have better access to resources 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 have maintained or have obtained a stable housing.

Service and outcome objectives will be re-evaluated and amended as needed, to consider changes in RAD site stabilization as building renovations are completed.

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 that were outreached annually.
- 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 resources 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:

Esperanza.Zapien@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. Program Monitoring: 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. 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.

HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY

Contractor's Name

Gilde Community Housing

(Check One) New Renewal Modification

If modification, Effective Date of Mod. No. of Mod.

Program: 350 Ellis - Rental Assistance Demonstration

TOTAL

Budget Reference Page No.(s)

Program Term	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
--------------	----------------	----------------	----------------	----------------	----------------	----------------

Human Services Agency Expenditures

13 Salaries & Benefits	\$54,107	\$54,107	\$54,107	\$54,107	\$54,107	\$270,535
14 Operating Expense	\$7,262	\$7,262	\$7,262	\$7,262	\$7,262	\$36,310
15 Capital Expenditure	\$0	\$0	\$0	\$0	\$0	\$0
16 Subtotal	\$61,369	\$61,369	\$61,369	\$61,369	\$61,369	\$306,845
17 Indirect Percentage (%)	12.00%	12.00%	12.00%	12.00%	12.00%	
18 Indirect Cost (Line 16 X Line 17)	\$7,364	\$7,364	\$7,364	\$7,364	\$7,364	\$36,820
19 Total HSA Expenditures	\$68,733	\$68,733	\$68,733	\$68,733	\$68,733	\$343,665

Developer Match Expenditures

21 Salaries & Benefits	\$70,264	\$70,264	\$70,264	\$70,264	\$70,264	\$351,320
22 Operating Expense	\$4,588	\$4,588	\$4,588	\$4,588	\$4,588	\$22,940
23 Capital Expenditure	\$0	\$0	\$0	\$0	\$0	\$0
24 Subtotal	\$74,852	\$74,852	\$74,852	\$74,852	\$74,852	\$374,260
25 Indirect Percentage (%)	12.00%	12.00%	12.00%	12.00%	12.00%	
26 Indirect Cost (Line 16 X Line 17)	\$8,982	\$8,982	\$8,982	\$8,982	\$8,982	\$44,911
27 Total Developer Expenditures	\$83,834	\$83,834	\$83,834	\$83,834	\$83,834	\$419,171

28 **Total HSA and Developer Expenditures** \$152,568 \$152,568 \$152,568 \$152,568 \$152,568 \$152,568 \$762,836

HSA Revenues

31 Local General Fund	\$68,733	\$68,733	\$68,733	\$68,733	\$68,733	\$343,665
32						
33						
34						
35						
36						
37						
38						

39 **TOTAL HSA REVENUES** \$68,733 \$68,733 \$68,733 \$68,733 \$68,733 \$68,733 \$343,665

Developer Revenues

41 Developer Match Funds	\$83,834	\$83,834	\$83,834	\$83,834	\$83,834	\$419,171
42						
43						
44						
45 Total Developer Revenues	\$83,834	\$83,834	\$83,834	\$83,834	\$83,834	\$419,171
46 Total Revenues	\$152,568	\$152,568	\$152,568	\$152,568	\$152,568	\$762,836
47 Full Time Equivalent (FTE)	1.84	1.84	1.84	1.84	1.84	

49 Prepared by: Pamela Grayson-Holmon Telephone No. 415-674-6107

50 HSA-CO Review Signature:

51 HSA #1

Contractor's Name: Glide Community Housing - 350 Ellis (RAD)

Operating Expense Detail

		Human Services Agency					
	TERM	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
11	HSA Expenditure Category						
12	Rental of Property						
13	Utilities (Elec, Water, Gas, Phone, Scavenger)	\$782	\$782	\$782	\$782	\$782	\$3,910
14	Office Supplies, Postage	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$5,000
15	Building Maintenance Supplies and Repair						
16	Printing and Reproduction						
17	Insurance						
18	Staff Training	\$500	\$500	\$500	\$500	\$500	\$2,500
19	Staff Travel (Local & Out of Town)						\$0
20	Rental of Equipment	\$3,480	\$3,480	\$3,480	\$3,480	\$3,480	\$17,400
21							
22							
23	OTHER						
24	Resident Activities	\$500	\$500	\$500	\$500	\$500	\$2,500
25	Consultants/Subcontractors-IT Services	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$5,000
26							
27							
28	TOTAL HSA OPERATING EXPENSE	\$7,262	\$7,262	\$7,262	\$7,262	\$7,262	\$36,310
29							
30	Developer Match Operating Expense						
31	Rental of Property						
32	Utilities(Elec, Water, Gas, Phone, Scavenger)						
33	Office Supplies, Postage	\$893	\$893	\$893	\$893	\$893	\$4,465
34	Building Maintenance Supplies and Repair						
35	Printing and Reproduction						
36	Insurance						
37	Staff Training	\$420	\$420	\$420	\$420	\$420	\$2,100
38	Staff Travel (Local & Out of Town)						
39	Rental of Equipment						
40							
41	OTHER						
42	Resident Activities	\$3,275	\$3,275	\$3,275	\$3,275	\$3,275	\$16,375
43							
44							
45	TOTAL DEVELOPER OPERATING EXPENSE	\$4,588	\$4,588	\$4,588	\$4,588	\$4,588	\$22,940
46							
47							
48	TOTAL OPERATING EXPENSE	\$11,850	\$11,850	\$11,850	\$11,850	\$11,850	\$59,250
49							
50	HSA #3						

APPENDIX A

**AGREEMENT BETWEEN
THE SAN FRANCISCO DEPARTMENT OF AGING AND ADULT SERVICES
AND
MERCY HOUSING**

**RAD Housing Support Services at 345 Arguello Boulevard
Grant Term – July 1, 2019 through June 30, 2024**

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 older adults 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.
Economic Mobility Activities	Any activity that may improve and/or maintain tenants' financial stability (e.g. workshop on how to save money, learn how to balance a check, presentation about credit cards and debt, etc.)
Grantee	Mercy Housing
Health and Wellness Services	Any service that supports and/or promotes tenants' health and well-being (i.e. Adult Day Health, nutrition programs, free health screenings, DAAS services, etc.)
Older Adults	Person who is 62 years and older
RAD	Rental Assistance Demonstration

III. Target Population

Older adults 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 1.0 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.
- 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 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 elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- Grantee will be compliant with laws related to confidentiality and privacy, including the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement. If Grantee is additionally a Business Associate, please refer to Business Associate 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 is responsible for program language capacity reflective of the tenant population served to best provide culturally appropriate services.
- Grantee will conduct an annual survey measuring program outcomes and whether tenants felt services effectively made an impact.
- 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 submit aggregate demographic information, including Sexual Orientation and Gender Identity (SOGI) data, annually to DAAS.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

Service objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- 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). Types of activities annually must be at least 10% trainings/workshops, 25% health and wellness related, and 65% all other.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will outreach to 100% unduplicated tenants annually.

VIII. Outcome Objectives

Outcome objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the annual survey will feel “strongly” or “very strongly” about being connected and involved in their tenant/resident community. Grantee may use the following standardized question: “How strongly do you feel 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 resources improving their health and wellness. At least 50% of unduplicated tenant participating in the annual survey will “agree” or “highly agree” that they have better access to resources that improve their health and wellness. Grantee may use the following standardized question: “Do you have better access to resources 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 have maintained or have obtained a 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 that were outreached annually.
- 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 resources 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:

Esperanza.Zapien@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. Program Monitoring: 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. 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.

	A	B	C	D	E	F	G
1							Appendix B, Page 1
2							Document Date: 11/6/2018
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY						
4	BY PROGRAM						
5	Contractor's Name:			Contract Term:			
6	Mercy Housing California			July 1, 2019 - June 30, 2024			
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>						
8	If modification, Effective Date of Mod.		No. of Mod.				
9	Program: 345 Arguello (RAD Seniors)						
10	Budget Reference Page No.(s)						TOTAL
11	Program Term	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
12	Human Services Agency Expenditures						
13	Salaries & Benefits	\$0	\$0	\$0	\$0	\$0	\$0
14	Operating Expense	\$31,233	\$31,233	\$31,233	\$31,233	\$31,233	\$156,165
15	Capital Expenditure						\$0
16	Subtotal	\$31,233	\$31,233	\$31,233	\$31,233	\$31,233	\$156,165
17	Indirect Percentage (%)	15%	15%	15%	15%	15%	15%
18	Indirect Cost (Line 16 X Line 17)	\$4,685	\$4,685	\$4,685	\$4,685	\$4,685	\$23,425
19	Total HSA Expenditures	\$35,918	\$35,918	\$35,918	\$35,918	\$35,918	\$179,590
20	Developer Match Expenditures						
21	Salaries & Benefits	\$96,000	\$98,880	\$101,846	\$104,902	\$108,049	\$509,677
22	Operating Expense	\$27,860	\$27,860	\$27,860	\$27,860	\$27,860	\$139,300
23	Capital Expenditure						\$0
24	Subtotal	\$123,860	\$126,740	\$129,706	\$132,762	\$135,909	\$648,977
25	Indirect Percentage (%)	10%	10%	10%	10%	10%	10%
26	Indirect Cost (Line 24 X Line 25)	\$12,386	\$12,674	\$12,971	\$13,276	\$13,591	\$64,898
27	Total Developer Expenditures	\$136,246	\$139,414	\$142,677	\$146,038	\$149,500	\$713,875
28							
29	Total HSA and Developer Expenditures	\$172,164	\$175,332	\$178,595	\$181,956	\$185,418	\$893,464
30	HSA Revenues						
31	Local General Fund	\$35,918	\$35,918	\$35,918	\$35,918	\$35,918	\$179,590
32							
33							
34							
35							
36							
37							
38							
39	TOTAL HSA REVENUES	\$35,918	\$35,918	\$35,918	\$35,918	\$35,918	\$179,590
40	Developer Revenues						
41	Developer Match Funds	\$136,246	\$139,414	\$142,677	\$146,038	\$149,500	\$713,875
42							
43							
44							
45	Total Developer Revenues	\$136,246	\$139,414	\$142,677	\$146,038	\$149,500	\$713,875
46	Total Revenues	\$172,164	\$175,332	\$178,595	\$181,956	\$185,418	\$893,464
47	Full Time Equivalent (FTE)	1.20	1.20	1.20	1.20	1.20	
49	Prepared by: Samantha Hogg	Telephone No. 415-355-7120				Date: 11/16/2018	
50	HSA-CO Review Signature: _____						
51	HSA #1						
52							

Contractor's Name:
 Mercy Housing California

Operating Expense Detail

		Human Services Agency	TOTAL				
	TERM	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
11	Rental of Property						
12	Telephone and Office Furniture	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$5,000
13	Program/Office Supplies						
14	Utilities (Electricity, Water, Sewer, Gas, Phone)						
15	Printing and Reproduction						
16	Insurance						
17	Staff Travel (Local & Out of Town) & Training	\$1,500	\$1,500	\$1,500	\$1,500	\$1,500	\$7,500
18	Law Library						
19	Membership/Dues						
20	Rental of Equipment						
21	Senior Right Bulletin						
22							
23							
24							
25	OTHER						
26	Supplies for Monthly Community Projects & Events i.e. Health and Wellness programs, Education Workshops, Food & Beverages.	\$20,390	\$20,390	\$20,390	\$20,390	\$20,390	\$101,950
27	Supervision	\$8,343	\$8,343	\$8,343	\$8,343	\$8,343	\$41,715
28							
29							
30							
31	TOTAL HSA OPERATING EXPENSE	\$31,233	\$31,233	\$31,233	\$31,233	\$31,233	\$156,165

33	<u>Developer Match Operating Expense</u>						
34	Staff Travel						
35	Telephone and Furniture						
36	Office Supplies, Postage						
37	Printing and Reproduction						
38	Program Supplies						
39	Law Library						
40	Membership/Dues						
41	Rental of Equipment						
42	Volunteer Expenses (Receptionist/intake)						
43	Translation Services/Language Line						
44	Educational Programs/LCSW/Other Outside Services						
45	Charting						
46	Staff Training						
47	0.2 FTE Contracted Services/Wellness Nurse	\$27,860	\$27,860	\$27,860	\$27,860	\$27,860	\$139,300
48							
49	TOTAL DEVELOPER OPERATING EXPENSE	\$27,860	\$27,860	\$27,860	\$27,860	\$27,860	\$139,300
50							
51	TOTAL OPERATING EXPENSE	\$59,093	\$59,093	\$59,093	\$59,093	\$59,093	\$295,465

HSA #3

APPENDIX A

AGREEMENT BETWEEN THE SAN FRANCISCO DEPARTMENT OF AGING AND ADULT SERVICES AND MERCY HOUSING RAD Housing Support Services at 491-31st Avenue Grant Term – July 1, 2019 through June 30, 2024

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 older adults 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.
Economic Mobility Activities	Any activity that may improve and/or maintain tenants' financial stability (e.g. workshop on how to save money, learn how to balance a check, presentation about credit cards and debt, etc.)
Grantee	Mercy Housing
Health and Wellness Services	Any service that supports and/or promotes tenants' health and well-being (i.e. Adult Day Health, nutrition programs, free health screenings, DAAS services, etc.)
Older Adults	Person who is 62 years and older
RAD	Rental Assistance Demonstration

III. Target Population

Older adults 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 1.0 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.
- 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 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 elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- Grantee will be compliant with laws related to confidentiality and privacy, including the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement. If Grantee is additionally a Business Associate, please refer to Business Associate 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 is responsible for program language capacity reflective of the tenant population served to best provide culturally appropriate services.
- Grantee will conduct an annual survey measuring program outcomes and whether tenants felt services effectively made an impact.
- 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 submit aggregate demographic information, including Sexual Orientation and Gender Identity (SOGI) data, annually to DAAS.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

Service objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- 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). Types of activities annually must be at least 10% trainings/workshops, 25% health and wellness related, and 65% all other.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will outreach to 100% unduplicated tenants annually.

VIII. Outcome Objectives

Outcome objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the annual survey will feel “strongly” or “very strongly” about being connected and involved in their tenant/resident community. Grantee may use the following standardized question: “How strongly do you feel 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 resources improving their health and wellness. At least 50% of unduplicated tenant participating in the annual survey will “agree” or “highly agree” that they have better access to resources that improve their health and wellness. Grantee may use the following standardized question: “Do you have better access to resources 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 have maintained or have obtained a 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 that were outreached annually.
 - 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 resources 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:

Esperanza.Zapien@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. Program Monitoring: 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. 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.

	A	B	C	D	E	F	G
1							Appendix B, Page 1
2							Document Date: 11/6/2018
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY						
4	BY PROGRAM						
5	Contractor's Name:				Contract Term:		
6	Mercy Housing California				July 1, 2019 - June 30, 2024		
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>						
8	If modification, Effective Date of Mod.		No. of Mod.				
9	Program: 491 31st Ave (RAD Seniors)						
10	Budget Reference Page No.(s)						TOTAL
11	Program Term	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
12	Human Services Agency Expenditures						
13	Salaries & Benefits	\$0	\$0	\$0	\$0	\$0	\$0
14	Operating Expense	\$32,603	\$32,603	\$32,603	32,603	32,603	\$163,015
15	Capital Expenditure						\$0
16	Subtotal	\$32,603	\$32,603	\$32,603	\$32,603	\$32,603	\$163,015
17	Indirect Percentage (%)	15%	15%	15%	15%	15%	15%
18	Indirect Cost (Line 16 X Line 17)	\$4,891	\$4,891	\$4,891	\$4,891	\$4,891	\$24,455
19	Total HSA Expenditures	\$37,494	\$37,494	\$37,494	\$37,494	\$37,494	\$187,470
20	Developer Match Expenditures						
21	Salaries & Benefits	\$71,008	\$73,138	\$75,332	\$77,592	\$79,920	\$376,991
22	Operating Expense						\$0
23	Capital Expenditure						\$0
24	Subtotal	\$71,008	\$73,138	\$75,332	\$77,592	\$79,920	\$376,991
25	Indirect Percentage (%)	10%	10%	10%	10%	10%	10%
26	Indirect Cost (Line 16 X Line 17)	\$7,101	\$7,314	\$7,533	\$7,759	\$7,992	\$37,699
27	Total Developer Expenditures	\$78,109	\$80,452	\$82,866	\$85,352	\$87,912	\$414,690
28							
29	Total HSA and Developer Expenditures	\$115,603	\$117,946	\$120,360	\$122,846	\$125,406	\$602,160
30	HSA Revenues						
31	Local General Fund	\$37,494	\$37,494	\$37,494	\$37,494	\$37,494	\$187,470
32							
33							
34							
35							
36							
37							
38							
39	TOTAL HSA REVENUES	\$37,494	\$37,494	\$37,494	\$37,494	\$37,494	\$187,470
40	Developer Revenues						
41	Developer Match Funds	\$78,109	\$80,452	\$82,866	\$85,352	\$87,912	\$414,690
42							
43							
44							
45	Total Developer Revenues	\$78,109	\$80,452	\$82,866	\$85,352	\$87,912	\$414,690
46	Total Revenues	\$115,603	\$117,946	\$120,360	\$122,846	\$125,406	\$602,160
47	Full Time Equivalent (FTE)	1.00	1.00	1.00	1.00	1.00	1.00
49	Prepared by:	Samantha Hogg Telephone No. 415-355-7120				Date 11/14/2018	
50	HSA-CO Review Signature:	_____					
51	HSA #1						
52							

Contractor's Name:
 Mercy Housing California

Salaries & Benefits Detail

		Human Services Agency 7/1/19-6/30/20		Human Services Agency 7/1/20-6/30/21		Human Services Agency 7/1/21-6/30/22		Human Services Agency 7/1/22-6/30/23		Human Services Agency 7/1/23-6/30/24		TOTAL 7/1/19-6/30/24	
POSITION TITLE	Annual Full Time Salary for FTE	FTE	SALARIES										
23	TOTALS	0.000	\$0	0.000	\$0	0.000	\$0	0.000	\$0	0.000	\$0	\$0	
26	EMPLOYEE FRINGE BENEFITS	28.0%	\$0	28.0%	\$0	28.0%	\$0	28.0%	\$0	28.0%	\$0	\$0	
29	TOTAL HSA SALARIES & BENEFITS		\$0		\$0		\$0		\$0		\$0	\$0	
31	DEVELOPER MATCH POSITION TITLE												
32	Resident Services Coordinator	\$56,475	1.000	\$55,475	1.000	\$57,139	1.000	\$58,853	1.000	\$60,619	1.000	\$62,438	\$294,524
38	TOTALS	\$56,475	1.000	\$55,475	1.000	\$57,139	1.000	\$58,853	1.000	\$60,619	1.000	\$62,438	\$294,524
40	EMPLOYEE FRINGE BENEFITS	28.0%	\$15,533	28.0%	\$15,999	28.0%	\$16,479	28.0%	\$16,973	28.0%	\$17,483	\$82,467	
42	TOTAL DEVELOPER SALARIES & BENEFITS		\$71,008		\$73,138		\$75,332		\$77,592		\$79,920	\$376,991	
43	TOTAL SALARIES & BENEFITS	1.000	\$71,008	1.000	\$73,138	1.000	\$75,332	1.000	\$77,592	1.000	\$79,920	\$376,991	
45	HSA #2												

APPENDIX A

**AGREEMENT BETWEEN
THE SAN FRANCISCO DEPARTMENT OF AGING AND ADULT SERVICES
AND
MERCY HOUSING
RAD Housing Support Services at 1880 Pine Street
Grant Term – July 1, 2019 through June 30, 2024**

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 older adults 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.
Economic Mobility Activities	Any activity that may improve and/or maintain tenants' financial stability (e.g. workshop on how to save money, learn how to balance a check, presentation about credit cards and debt, etc.)
Grantee	Mercy Housing
Health and Wellness Services	Any service that supports and/or promotes tenants' health and well-being (i.e. Adult Day Health, nutrition programs, free health screenings, DAAS services, etc.)
Older Adults	Person who is 62 years and older
RAD	Rental Assistance Demonstration

III. Target Population

Older adults 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.
- 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 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 elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- Grantee will be compliant with laws related to confidentiality and privacy, including the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement. If Grantee is additionally a Business Associate, please refer to Business Associate 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 is responsible for program language capacity reflective of the tenant population served to best provide culturally appropriate services.
- Grantee will conduct an annual survey measuring program outcomes and whether tenants felt services effectively made an impact.
- 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 submit aggregate demographic information, including Sexual Orientation and Gender Identity (SOGI) data, annually to DAAS.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

Service objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- 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). Types of activities annually must be at least 10% trainings/workshops, 25% health and wellness related, and 65% all other.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will outreach to 100% unduplicated tenants annually.

VIII. Outcome Objectives

Outcome objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the annual survey will feel “strongly” or “very strongly” about being connected and involved in their tenant/resident community. Grantee may use the following standardized question: “How strongly do you feel 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 resources improving their health and wellness. At least 50% of unduplicated tenant participating in the annual survey will “agree” or “highly agree” that they have better access to resources that improve their health and wellness. Grantee may use the following standardized question: “Do you have better access to resources 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 have maintained or have obtained a 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 that were outreached annually.
 - 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 resources 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:

Esperanza.Zapien@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. Program Monitoring: 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. 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.

**HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY
 BY PROGRAM**

Contractor's Name:

Contract Term:

Mercy Housing California

July 1, 2019 - June 30, 2024

(Check One) New Renewal Modification

If modification, Effective Date of Mod. No. of Mod.

	A	B	C	D	E	F	G
9	Program: 1880 Pine Street (RAD Seniors)						
10	Budget Reference Page No.(s)						TOTAL
11	Program Term	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
12	Human Services Agency Expenditures						
13	Salaries & Benefits	\$40,499	\$40,499	\$40,499	\$40,499	\$40,499	\$202,495
14	Operating Expense	\$45,521	\$45,521	\$45,521	45,521	45,521	\$227,605
15	Capital Expenditure						\$0
16	Subtotal	\$86,020	\$86,020	\$86,020	\$86,020	\$86,020	\$430,100
17	Indirect Percentage (%)	15%	15%	15%	15%	15%	15%
18	Indirect Cost (Line 16 X Line 17)	\$12,903	\$12,903	\$12,903	\$12,903	\$12,903	\$64,515
19	Total HSA Expenditures	\$98,923	\$98,923	\$98,923	\$98,923	\$98,923	\$494,615
20	Developer Match Expenditures						
21	Salaries & Benefits	\$101,734	\$104,786	\$107,930	\$111,168	\$114,503	\$540,122
22	Operating Expense	\$58,990	\$58,990	58,990	58,990	58,990	\$294,950
23	Capital Expenditure						\$0
24	Subtotal	\$160,724	\$163,776	\$166,920	\$170,158	\$173,493	\$835,072
25	Indirect Percentage (%)	10%	10%	10%	10%	10%	10%
26	Indirect Cost (Line 16 X Line 17)	\$16,072	\$16,378	\$16,692	\$17,016	\$17,349	\$83,507
27	Total Developer Expenditures	\$176,797	\$180,154	\$183,612	\$187,174	\$190,842	\$918,579
28							
29	Total HSA and Developer Expenditures	\$275,720	\$279,077	\$282,535	\$286,097	\$289,765	\$1,413,194
30	HSA Revenues						
31	Local General Fund	\$98,923	\$98,923	\$98,923	\$98,923	\$98,923	\$494,615
32							
33							
34							
35							
36							
37							
38							
39	TOTAL HSA REVENUES	\$98,923	\$98,923	\$98,923	\$98,923	\$98,923	\$494,615
40	Developer Revenues						
41	Developer Match Funds	\$176,797	\$180,154	\$183,612	\$187,174	\$190,842	\$918,579
42							
43							
44							
45	Total Developer Revenues	\$176,797	\$180,154	\$183,612	\$187,174	\$190,842	\$918,579
46	Total Revenues	\$275,720	\$279,077	\$282,535	\$286,097	\$289,765	\$1,413,194
47	Full Time Equivalent (FTE)	2.40	2.40	2.40	2.40	2.40	
49	Prepared by: Samantha Hogg	Telephone No. 415-355-7120				Date 11/14/2018	
50	HSA-CO Review Signature:	_____					
51	HSA #1						
52							

APPENDIX A

AGREEMENT BETWEEN THE SAN FRANCISCO DEPARTMENT OF AGING AND ADULT SERVICES AND MERCY HOUSING RAD Housing Support Services at 1760 Bush Street Grant Term – July 1, 2019 through June 30, 2024

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 older adults 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.
Economic Mobility Activities	Any activity that may improve and/or maintain tenants' financial stability (e.g. workshop on how to save money, learn how to balance a check, presentation about credit cards and debt, etc.)
Grantee	Mercy Housing California
Health and Wellness Services	Any service that supports and/or promotes tenants' health and well-being (i.e. Adult Day Health, nutrition programs, free health screenings, DAAS services, etc.)
Older Adults	Person who is 62 years and older
RAD	Rental Assistance Demonstration

III. Target Population

Older adults 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
 - 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 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.
- 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 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 elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- Grantee will be compliant with laws related to confidentiality and privacy, including the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement. If Grantee is additionally a Business Associate, please refer to Business Associate 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 is responsible for program language capacity reflective of the tenant population served to best provide culturally appropriate services.
- Grantee will conduct an annual survey measuring program outcomes and whether tenants felt services effectively made an impact.
- 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 submit aggregate demographic information, including Sexual Orientation and Gender Identity (SOGI) data, annually to DAAS.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

Service objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- 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). Types of activities annually must be at least 10% trainings/workshops, 25% health and wellness related, and 65% all other.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will outreach to 100% unduplicated tenants annually.

VIII. Outcome Objectives

Outcome objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the annual survey will feel “strongly” or “very strongly” about being connected and involved in their tenant/resident community. Grantee may use the following standardized question: “How strongly do you feel 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 resources improving their health and wellness. At least 50% of unduplicated tenant participating in the annual survey will “agree” or “highly agree” that they have better access to resources that improve their health and wellness. Grantee may use the following standardized question: “Do you have better access to resources 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 have maintained or have obtained a 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 that were outreached annually.
 - 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 resources 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:

Esperanza.Zapien@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. Program Monitoring: 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. 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.

	A	B	C	D	E	F	G
1							Appendix B, Page 1
2							Document Date: 11/6/2018
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY						
4	BY PROGRAM						
5	Contractor's Name:				Contract Term:		
6	Mercy Housing California				July 1, 2019 - June 30, 2024		
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>						
8	If modification, Effective Date of Mod.		No. of Mod.				
9	Program: 1760 Bush (RAD II Seniors)						
10	Budget Reference Page No.(s)						TOTAL
11	Program Term	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
12	Human Services Agency Expenditures						
13	Salaries & Benefits	\$40,499	\$40,499	\$40,499	\$40,499	\$40,499	\$202,495
14	Operating Expense	\$44,378	\$44,378	\$44,378	44,378	44,378	\$221,890
15	Capital Expenditure						\$0
16	Subtotal	\$84,877	\$84,877	\$84,877	\$84,877	\$84,877	\$424,385
17	Indirect Percentage (%)	15%	15%	15%	15%	15%	15%
18	Indirect Cost (Line 16 X Line 17)	\$12,732	\$12,732	\$12,732	\$12,732	\$12,732	\$63,660
19	Total HSA Expenditures	\$97,609	\$97,609	\$97,609	\$97,609	\$97,609	\$488,045
20	Developer Match Expenditures						
21	Salaries & Benefits	\$109,619	\$112,908	\$116,295	\$119,784	\$123,378	\$581,984
22	Operating Expense						\$0
23	Capital Expenditure						\$0
24	Subtotal	\$109,619	\$112,908	\$116,295	\$119,784	\$123,378	\$581,984
25	Indirect Percentage (%)	10%	10%	10%	10%	10%	10%
26	Indirect Cost (Line 16 X Line 17)	\$10,962	\$11,291	\$11,630	\$11,978	\$12,338	\$58,198
27	Total Developer Expenditures	\$120,581	\$124,199	\$127,925	\$131,762	\$135,716	\$640,183
28							
29	Total HSA and Developer Expenditures	\$218,190	\$221,807	\$225,533	\$229,371	\$233,325	\$1,128,227
30	HSA Revenues						
31	Local General Fund	\$97,609	\$97,609	\$97,609	\$97,609	\$97,609	\$488,045
32							
33							
34							
35							
36							
37							
38							
39	TOTAL HSA REVENUES	\$97,609	\$97,609	\$97,609	\$97,609	\$97,609	\$488,045
40	Developer Revenues						
41	Developer Match Funds	\$120,581	\$124,199	\$127,925	\$131,762	\$135,716	\$640,183
42							
43							
44							
45	Total Developer Revenues	\$120,581	\$124,199	\$127,925	\$131,762	\$135,716	\$640,183
46	Total Revenues	\$218,190	\$221,807	\$225,533	\$229,371	\$233,325	\$1,128,228
47	Full Time Equivalent (FTE)	1.50	1.50	1.50	1.50	1.50	1.50
49	Prepared by: Samantha Hogg	Telephone No. 415-355-7120				Date: 11/16/2018	
50	HSA-CO Review Signature: _____						
51	HSA #1						
52							

APPENDIX A

AGREEMENT BETWEEN THE SAN FRANCISCO DEPARTMENT OF AGING AND ADULT SERVICES AND MERCY HOUSING

RAD Housing Support Services at JFK Towers (2451 Sacramento Street)
Grant Term – July 1, 2019 through June 30, 2024

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 older adults 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.
Economic Mobility Activities	Any activity that may improve and/or maintain tenants' financial stability (e.g. workshop on how to save money, learn how to balance a check, presentation about credit cards and debt, etc.)
Grantee	Mercy Housing California
Health and Wellness Services	Any service that supports and/or promotes tenants' health and well-being (i.e. Adult Day Health, nutrition programs, free health screenings, DAAS services, etc.)
Older Adults	Person who is 62 years and older
RAD	Rental Assistance Demonstration

III. Target Population

Older Adults 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
 - 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 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.
- 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 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 elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- Grantee will be compliant with laws related to confidentiality and privacy, including the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement. If Grantee is additionally a Business Associate, please refer to Business Associate 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 is responsible for program language capacity reflective of the tenant population served to best provide culturally appropriate services.
- Grantee will conduct an annual survey measuring program outcomes and whether tenants felt services effectively made an impact.
- 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 submit aggregate demographic information, including Sexual Orientation and Gender Identity (SOGI) data, annually to DAAS.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

Service objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- 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). Types of activities annually must be at least 10% trainings/workshops, 25% health and wellness related, and 65% all other.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will outreach to 100% unduplicated tenants annually.

VIII. Outcome Objectives

Outcome objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the annual survey will feel “strongly” or “very strongly” about being connected and involved in their tenant/resident community. Grantee may use the following standardized question: “How strongly do you feel 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 resources improving their health and wellness. At least 50% of unduplicated tenant participating in the annual survey will “agree” or “highly agree” that they have better access to resources that improve their health and wellness. Grantee may use the following standardized question: “Do you have better access to resources 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 have maintained or have obtained a 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 that were outreached annually.
 - 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 resources 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:

Esperanza.Zapien@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. Program Monitoring: 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. 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.

**HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY
 BY PROGRAM**

Contractor's Name:

Contract Term:

Mercy Housing California

July 1, 2019 - June 30, 2024

(Check One) New Renewal Modification

If modification, Effective Date of Mod. No. of Mod.

Program: JFK Tower (RAD II Seniors)

Budget Reference Page No.(s)

Program Term

7/1/19-6/30/20

7/1/20-6/30/21

7/1/21-6/30/22

7/1/22-6/30/23

7/1/23-6/30/24

TOTAL
7/1/19-6/30/24

Human Services Agency Expenditures

Salaries & Benefits

\$20,250

\$20,250

\$20,250

\$20,250

\$20,250

\$101,250

Operating Expense

\$39,975

\$39,975

\$39,975

\$39,975

\$39,975

\$199,875

Capital Expenditure

\$0

Subtotal

\$60,225

\$60,225

\$60,225

\$60,225

\$60,225

\$301,125

Indirect Percentage (%)

15%

15%

15%

15%

15%

15%

Indirect Cost (Line 16 X Line 17)

\$9,033

\$9,033

\$9,033

\$9,033

\$9,033

\$45,165

Total HSA Expenditures

\$69,258

\$69,258

\$69,258

\$69,258

\$69,258

\$346,290

Developer Match Expenditures

Salaries & Benefits

\$83,430

\$85,933

\$88,511

\$91,167

\$93,902

\$442,943

Operating Expense

\$0

Capital Expenditure

\$0

Subtotal

\$83,430

\$85,933

\$88,511

\$91,167

\$93,902

\$442,943

Indirect Percentage (%)

Indirect Cost (Line 16 X Line 17)

\$0

\$0

\$0

\$0

\$0

\$0

Total Developer Expenditures

\$83,430

\$85,933

\$88,511

\$91,167

\$93,902

\$442,943

Total HSA and Developer Expenditures

\$152,688

\$155,191

\$157,769

\$160,425

\$163,160

\$789,233

HSA Revenues

Local General Fund

\$69,258

\$69,258

\$69,258

\$69,258

\$69,258

\$346,290

TOTAL HSA REVENUES

\$69,258

\$69,258

\$69,258

\$69,258

\$69,258

\$346,290

Developer Revenues

Developer Match Funds

\$83,430

\$85,933

\$88,511

\$91,167

\$93,902

\$442,943

Total Developer Revenues

\$83,430

\$85,933

\$88,511

\$91,167

\$93,902

\$442,943

Total Revenues

\$152,688

\$155,191

\$157,769

\$160,425

\$163,160

\$789,233

Full Time Equivalent (FTE)

1.25

1.25

1.25

1.25

1.25

Prepared by: Samantha Hogg

Telephone No. 415-355-7120

Date 11/14/2018

HSA-CO Review Signature: _____

HSA #1

APPENDIX A

**AGREEMENT BETWEEN
THE SAN FRANCISCO DEPARTMENT OF AGING AND ADULT SERVICES
AND
MERCY HOUSING**

**RAD Housing Support Services at 2698 California Street
Grant Term – July 1, 2019 through June 30, 2024**

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 older adults 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.
Economic Mobility Activities	Any activity that may improve and/or maintain tenants' financial stability (e.g. workshop on how to save money, learn how to balance a check, presentation about credit cards and debt, etc.)
Grantee	Mercy Housing California
Health and Wellness Services	Any service that supports and/or promotes tenants' health and well-being (i.e. Adult Day Health, nutrition programs, free health screenings, DAAS services, etc.)
Older Adults	Person who is 62 years and older
RAD	Rental Assistance Demonstration

III. Target Population

Older adults 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
 - 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 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.
- 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 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 elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- Grantee will be compliant with laws related to confidentiality and privacy, including the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement. If Grantee is additionally a Business Associate, please refer to Business Associate 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 is responsible for program language capacity reflective of the tenant population served to best provide culturally appropriate services.
- Grantee will conduct an annual survey measuring program outcomes and whether tenants felt services effectively made an impact.
- 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 submit aggregate demographic information, including Sexual Orientation and Gender Identity (SOGI) data, annually to DAAS.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

Service objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- 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). Types of activities annually must be at least 10% trainings/workshops, 25% health and wellness related, and 65% all other.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will outreach to 100% unduplicated tenants annually.

VIII. Outcome Objectives

Outcome objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the annual survey will feel “strongly” or “very strongly” about being connected and involved in their tenant/resident community. Grantee may use the following standardized question: “How strongly do you feel 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 resources improving their health and wellness. At least 50% of unduplicated tenant participating in the annual survey will “agree” or “highly agree” that they have better access to resources that improve their health and wellness. Grantee may use the following standardized question: “Do you have better access to resources 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 have maintained or have obtained a 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 that were outreached annually.
 - 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 resources 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:

Esperanza.Zapien@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. Program Monitoring: 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. 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.

	A	B	C	D	E	F	G
1							Appendix B, Page 1
2							Document Date: 11/6/2018
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY						
4	BY PROGRAM						
5	Contractor's Name:			Contract Term:			
6	Mercy Housing California			July 1, 2019 - June 30, 2024			
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>						
8	If modification, Effective Date of Mod.		No. of Mod.				
9	Program: 2698 California (RAD II Seniors)						
10	Budget Reference Page No.(s)						TOTAL
11	Program Term	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
12	Human Services Agency Expenditures						
13	Salaries & Benefits	\$20,250	\$20,250	\$20,250	\$20,250	\$20,250	\$101,250
14	Operating Expense	\$22,860	\$22,860	\$22,860	22,860	22,860	\$114,300
15	Capital Expenditure						\$0
16	Subtotal	\$43,110	\$43,110	\$43,110	\$43,110	\$43,110	\$215,550
17	Indirect Percentage (%)	15%	15%	15%	15%	15%	15%
18	Indirect Cost (Line 16 X Line 17)	\$6,466	\$6,466	\$6,466	\$6,466	\$6,466	\$32,330
19	Total HSA Expenditures	\$49,576	\$49,576	\$49,576	\$49,576	\$49,576	\$247,880
20	Developer Match Expenditures						
21	Salaries & Benefits	\$62,572	\$64,449	\$66,382	\$68,374	\$70,425	\$332,201
22	Operating Expense						\$0
23	Capital Expenditure						\$0
24	Subtotal	\$62,572	\$64,449	\$66,382	\$68,374	\$70,425	\$332,201
25	Indirect Percentage (%)	10%	10%	10%	10%	10%	10%
26	Indirect Cost (Line 16 X Line 17)	\$6,257	\$6,445	\$6,638	\$6,837	\$7,042	\$33,220
27	Total Developer Expenditures	\$68,829	\$70,894	\$73,020	\$75,211	\$77,467	\$365,421
28							
29	Total HSA and Developer Expenditures	\$118,405	\$120,470	\$122,596	\$124,787	\$127,043	\$613,301
30	HSA Revenues						
31	Local General Fund	\$49,576	\$49,576	\$49,576	\$49,576	\$49,576	\$247,880
32							
33							
34							
35							
36							
37							
38							
39	TOTAL HSA REVENUES	\$49,576	\$49,576	\$49,576	\$49,576	\$49,576	\$247,880
40	Developer Revenues						
41	Developer Match Funds	\$68,829	\$70,894	\$73,020	\$75,211	\$77,467	\$365,421
42							
43							
44							
45	Total Developer Revenues	\$68,829	\$70,894	\$73,020	\$75,211	\$77,467	\$365,421
46	Total Revenues	\$118,405	\$120,470	\$122,596	\$124,787	\$127,043	\$613,301
47	Full Time Equivalent (FTE)	1.00	1.00	1.00	1.00	1.00	
49	Prepared by: Samantha Hogg	Telephone No. 415-355-7120				11/14/2018	
50	HSA-CO Review Signature: _____						
51	HSA #1						
52							

APPENDIX A

AGREEMENT BETWEEN THE SAN FRANCISCO DEPARTMENT OF AGING AND ADULT SERVICES AND TENDERLOIN NEIGHBORHOOD DEVELOPMENT CORPORATION RAD Housing Support Services at 939-951 EDDY STREET Grant Term – July 1, 2019 through June 30, 2024

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 older adults 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.
Economic Mobility Activities	Any activity that may improve and/or maintain tenants' financial stability (e.g. workshop on how to save money, learn how to balance a check, presentation about credit cards and debt, etc.)
Grantee	Tenderloin Neighborhood Development Corporation
Health and Wellness Services	Any service that supports and/or promotes tenants' health and well-being (i.e. Adult Day Health, nutrition programs, free health screenings, DAAS services, etc.)
Older Adults	Person who is 62 years and older
RAD	Rental Assistance Demonstration

III. Target Population

Older adults and adults with disabilities residing in San Francisco RAD converted Housing Development units at 939-951 Eddy 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 1.0 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.
- 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 939-951 Eddy Street, Monday through Friday during regular office hours, excluding holidays.

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- Grantee will be compliant with laws related to confidentiality and privacy, including the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement. If Grantee is additionally a Business Associate, please refer to Business Associate 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 is responsible for program language capacity reflective of the tenant population served to best provide culturally appropriate services.
- Grantee will conduct an annual survey measuring program outcomes and whether tenants felt services effectively made an impact.
- 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 submit aggregate demographic information, including Sexual Orientation and Gender Identity (SOGI) data, annually to DAAS.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

Service objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- 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). Types of activities annually must be at least 10% trainings/workshops, 25% health and wellness related, and 65% all other.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will outreach to 100% unduplicated tenants annually.

VIII. Outcome Objectives

Service objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- 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 may use the following standardized question: “How strongly do you feel 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 resources improving their health and wellness. At least 50% of unduplicated tenant participating in the satisfaction survey will “agree” or “highly agree” that they have better access to resources that improve their health and wellness. Grantee may use the following standardized question: “Do you have better access to resources 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 have maintained or have obtained a 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 that were outreached annually.
 - 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 resources 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:

Esperanza.Zapien@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. Program Monitoring: 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. 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.

	A	B	C	D	E	F	G
1				Appendix B, Page 1			
2				Document Date:	2-Nov-18		
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY						
4	BY PROGRAM						
5	Contractor's Name			Contract Term			
6	Tenderloin Neighborhood Development Corporation			July 1, 2019 - June 30, 2024			
7	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification						
8	If modification, Effective Date of Mod. No. of Mod.			1.00			
9	Program: Rental Assistance Demonstration - 939-951 Eddy Street						TOTAL
10	Budget Reference Page No.(s)						
11	Program Term	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
12	Human Services Agency Expenditures						
13	Salaries & Benefits	\$0	\$0	\$0	\$0	\$0	\$0
14	Operating Expense	\$31,655	\$31,655	\$31,655	31,655	31,655	\$158,275
15	Capital Expenditure	\$0	\$0	\$0	\$0	\$0	\$0
16	Subtotal	\$31,655	\$31,655	\$31,655	\$31,655	\$31,655	\$158,275
17	Indirect Percentage (%)	6.00%	6.00%	6.00%	6.00%	6.00%	
18	Indirect Cost	\$1,899	\$1,899	\$1,899	\$1,899	\$1,899	\$9,495
19	Total HSA Expenditures	\$33,554	\$33,554	\$33,554	\$33,554	\$33,554	\$167,770
20	Developer Match Expenditures						
21	Salaries & Benefits	\$0	\$0	\$0	\$0	\$0	\$0
22	Operating Expense	\$76,415	\$76,415	\$76,415	\$76,415	\$76,415	\$382,075
23	Capital Expenditure	\$0	\$0	\$0	\$0	\$0	\$0
24	Subtotal	\$76,415	\$76,415	\$76,415	\$76,415	\$76,415	\$382,075
25	Indirect Percentage (%)	6.00%	6.00%	6.00%	6.00%	6.00%	
26	Indirect Cost	\$4,585	\$4,585	\$4,585	\$4,585	\$4,585	\$22,925
27	Total Developer Expenditures	\$81,000	\$81,000	\$81,000	\$81,000	\$81,000	\$405,000
28							
29	Total HSA and Developer Expenditures	\$114,554	\$114,554	\$114,554	\$114,554	\$114,554	\$572,770
30	HSA Revenues						
31	Local General Fund	\$33,554	\$33,554	\$33,554	\$33,554	\$33,554	\$167,770
32							\$0
33							\$0
34							\$0
35							\$0
36							\$0
37							\$0
38							\$0
39	TOTAL HSA REVENUES	\$33,554	\$33,554	\$33,554	\$33,554	\$33,554	\$167,770
40	Developer Revenues						
41	Developer Match Funds	\$81,000	\$81,000	\$81,000	\$81,000	\$81,000	\$405,000
42							\$0
43							\$0
44							\$0
45	Total Developer Revenues	\$81,000	\$81,000	\$81,000	\$81,000	\$81,000	\$405,000
46	Total Revenues	\$114,554	\$114,554	\$114,554	\$114,554	\$114,554	\$572,770
47	Full Time Equivalent (FTE)						
49	Prepared by:	Paul Carney	Telephone No.	415 358-3945	Date	Nov. 2, 2018	
50	HSA-CO Review Signature: _____						
51	HSA #1						
52							

	A	B	C	D	E	F	G
1	Appendix B, Page 1						
2	Document Date:						2-Nov-18
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY						
4	BY PROGRAM						
5	Contractor's Name			Contract Term			
6	TNDC Subcontractor: NCPHS			July 1, 2019 - June 30, 2024			
7	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification						
8	If modification, Effective Date of Mod.		No. of Mod.		1.00		
9	Program: Rental Assistance Demonstration - 939-951 Eddy Street						TOTAL
10	Budget Reference Page No.(s)						
11	Program Term	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
12	Human Services Agency Expenditures						
13	Salaries & Benefits	\$25,465	\$25,465	\$25,465	\$25,465	\$25,465	\$127,325
14	Operating Expense	\$6,190	\$6,190	\$6,190	6,190	6,190	\$30,950
15	Capital Expenditure	0		\$0			\$0
16	Subtotal	\$31,655	\$31,655	\$31,655	\$31,655	\$31,655	\$158,275
17	Indirect Percentage (%)	6.00%	6.00%	6.00%	6.00%	6.00%	
18	TNDC Indirect Cost	\$1,899	\$1,899	\$1,899	\$1,899	\$1,899	\$9,495
19	Total HSA Expenditures	\$33,554	\$33,554	\$33,554	\$33,554	\$33,554	\$167,770
20	Developer Match Expenditures						
21	Salaries & Benefits	\$62,319	\$62,319	\$62,319	\$62,319	\$62,319	\$311,594
22	Operating Expense	\$14,096	\$14,096	\$14,096	\$14,096	\$14,096	\$70,480
23	Capital Expenditure	\$0		0			\$0
24	Subtotal	\$76,415	\$76,415	\$76,415	\$76,415	\$76,415	\$382,075
25	Indirect Percentage (%)	6.00%	6.00%	6.00%	6.00%	6.00%	
26	TNDC Indirect Cost	\$4,585	\$4,585	\$4,585	\$4,585	\$4,585	\$22,925
27	Total Developer Expenditures	\$81,000	\$81,000	\$81,000	\$81,000	\$81,000	\$405,000
28							
29	Total HSA and Developer Expenditures	\$114,554	\$114,554	\$114,554	\$114,554	\$114,554	\$572,770
30	HSA Revenues						
31	Local General Fund	\$33,554	\$33,554	\$33,554	\$33,554	\$33,554	\$167,770
32							\$0
33							\$0
34							\$0
35							\$0
36							\$0
37							\$0
38							\$0
39	TOTAL HSA REVENUES	\$33,554	\$33,554	\$33,554	\$33,554	\$33,554	\$167,770
40	Developer Revenues						
41	TNDC Match Funds	\$81,000	\$81,000	\$81,000	\$81,000	\$81,000	\$405,000
42							\$0
43							\$0
44							\$0
45	Total Developer Revenues	\$81,000	\$81,000	\$81,000	\$81,000	\$81,000	\$405,000
46	Total Revenues	\$114,554	\$114,554	\$114,554	\$114,554	\$114,554	\$572,770
47	Full Time Equivalent (FTE)						
49	Prepared by:	Paul Carney	Telephone No.	415 358-3945	Date	Nov. 2, 2019	
50	HSA-CO Review Signature: _____						
51	HSA #1						
52							

APPENDIX A

AGREEMENT BETWEEN THE SAN FRANCISCO DEPARTMENT OF AGING AND ADULT SERVICES AND TENDERLOIN NEIGHBORHOOD DEVELOPMENT CORPORATION RAD Housing Support Services at 430 TURK STREET Grant Term – July 1, 2019 through June 30, 2024

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 older adults 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.
Economic Mobility Activities	Any activity that may improve and/or maintain tenants' financial stability (e.g. workshop on how to save money, learn how to balance a check, presentation about credit cards and debt, etc.)
Grantee	Tenderloin Neighborhood Development Corporation
Health and Wellness Services	Any service that supports and/or promotes tenants' health and well-being (i.e. Adult Day Health, nutrition programs, free health screenings, DAAS services, etc.)
Older Adults	Person who is 62 years and older
RAD	Rental Assistance Demonstration

III. Target Population

Older adults and adults with disabilities residing in San Francisco RAD converted Housing Development units at 430 Turk 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 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.
- 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 430 Turk Street, Monday through Friday during regular office hours, excluding holidays.

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- Grantee will be compliant with laws related to confidentiality and privacy, including the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement. If Grantee is additionally a Business Associate, please refer to Business Associate 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 is responsible for program language capacity reflective of the tenant population served to best provide culturally appropriate services.
- Grantee will conduct an annual survey measuring program outcomes and whether tenants felt services effectively made an impact.
- 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 submit aggregate demographic information, including Sexual Orientation and Gender Identity (SOGI) data, annually to DAAS.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

Service objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- 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). Types of activities annually must be at least 10% trainings/workshops, 25% health and wellness related, and 65% all other.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will outreach to 100% unduplicated tenants annually.

VIII. Outcome Objectives

Outcome objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the annual survey will feel “strongly” or “very strongly” about being connected and involved in their tenant/resident community. Grantee may use the following standardized question: “How strongly do you feel 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 resources improving their health and wellness. At least 50% of unduplicated tenant participating in the annual survey will “agree” or “highly agree” that they have better access to resources that improve their health and wellness. Grantee may use the following standardized question: “Do you have better access to resources 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 have maintained or have obtained a 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 that were outreached annually.
 - 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 resources 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:

Esperanza.Zapien@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. Program Monitoring: 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. 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.

	A	B	C	D	E	F	G
1				Appendix B, Page 1			
2				Document Date:	2-Nov-18		
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY						
4	BY PROGRAM						
5	Contractor's Name			Contract Term			
6	Tenderloin Neighborhood Development Corporation			July 1, 2019 - June 30, 2024			
7	(Check One) New ___ Renewal X Modification						
8	If modification, Effective Date of Mod. No. of Mod.			1.00			
9	Program: Rental Assistance Demonstration - 430 Turk Street						TOTAL
10	Budget Reference Page No.(s)						
11	Program Term	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
12	Human Services Agency Expenditures						
13	Salaries & Benefits	\$0	\$0	\$0	\$0	\$0	\$0
14	Operating Expense	\$64,013	\$64,013	\$64,013	\$64,013	\$64,013	\$320,065
15	Capital Expenditure	\$0	\$0	\$0	\$0	\$0	\$0
16	Subtotal	\$64,013	\$64,013	\$64,013	\$64,013	\$64,013	\$320,065
17	Indirect Percentage (%)	4.50%	4.50%	4.50%	4.50%	4.50%	
18	Indirect Cost	\$2,881	\$2,881	\$2,881	\$2,881	\$2,881	\$14,405
19	Total HSA Expenditures	\$66,894	\$66,894	\$66,894	\$66,894	\$66,894	\$334,470
20	Developer Match Expenditures						
21	Salaries & Benefits	\$0	\$0	\$0	\$0	\$0	\$0
22	Operating Expense	\$77,512	\$77,512	\$77,512	\$77,512	\$77,512	\$387,560
23	Capital Expenditure	\$0	\$0	\$0	\$0	\$0	\$0
24	Subtotal	\$77,512	\$77,512	\$77,512	\$77,512	\$77,512	\$387,560
25	Indirect Percentage (%)	4.50%	4.50%	4.50%	4.50%	4.50%	
26	Indirect Cost	\$3,488	\$3,488	\$3,488	\$3,488	\$3,488	\$17,440
27	Total Developer Expenditures	\$81,000	\$81,000	\$81,000	\$81,000	\$81,000	\$405,000
28							
29	Total HSA and Developer Expenditures	\$147,894	\$147,894	\$147,894	\$147,894	\$147,894	\$739,470
30	HSA Revenues						
31	Local General Fund	\$66,894	\$66,894	\$66,894	\$66,894	\$66,894	\$334,470
32							
33							
34							
35							
36							
37							
38							
39	TOTAL HSA REVENUES	\$66,894	\$66,894	\$66,894	\$66,894	\$66,894	\$334,470
40	Developer Revenues						
41	Developer Match Funds	\$81,000	\$81,000	\$81,000	\$81,000	\$81,000	\$405,000
42							
43							
44							
45	Total Developer Revenues	\$81,000	\$81,000	\$81,000	\$81,000	\$81,000	\$405,000
46	Total Revenues	\$147,894	\$147,894	\$147,894	\$147,894	\$147,894	\$739,470
47	Full Time Equivalent (FTE)						
49	Prepared by:	Paul Carney	Telephone No.	415 358-3945	Date	Nov. 2, 2018	
50	HSA-CO Review Signature: _____						
51	HSA #1						
52							

Contractor's Name:
Tenderloin Neighborhood Development Corporation

Operating Expense Detail

		Human Services Agency	TOTAL				
	TERM	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
9	HSA Expenditure Category						0
10	Rental of Property						\$0
11	Telephone and Office Furniture						\$0
12	Program/Office Supplies						\$0
13	Utilities (Electricity, Water, Sewer, Gas, Phone)						\$0
14	Printing and Reproduction						\$0
15	Insurance						\$0
16	Staff Travel (Local & Out of Town)						\$0
17	Law Library						\$0
18	Membership/Dues						\$0
19	Rental of Equipment						\$0
20	Senior Right Bulletin						\$0
21	Staff Training						\$0
22	Sub-Contractor (NCPHS)	\$64,013	\$64,013	\$64,013	\$64,013	\$64,013	\$320,065
23							
24							
25							
26							
27							
28							
29							\$0
30							
31	TOTAL HSA OPERATING EXPENSE	\$64,013	\$64,013	\$64,013	\$64,013	\$64,013	\$320,065
32							
33	Developer Match Operating Expense						\$0
34	Staff Travel						\$0
35	Telephone and Furniture						\$0
36	Office Supplies, Postage						\$0
37	Printing and Reproduction						\$0
38	Program Supplies						\$0
39	Law Library						\$0
40	Membership/Dues						\$0
41	Rental of Equipment						\$0
42	Volunteer Expenses (Receptionist/intake)						\$0
43	Translation Services/Language Line						\$0
44	Educational Programs/LCSW/Other Outside Services						\$0
45	Charting						\$0
46	Staff Training						\$0
47	Sub-Contractor (NCPHS)	\$77,512	\$77,512	\$77,512	\$77,512	\$77,512	\$387,560
48							\$0
49	TOTAL DEVELOPER OPERATING EXPENSE	\$77,512	\$77,512	\$77,512	\$77,512	\$77,512	\$387,560
50							\$0
51	TOTAL OPERATING EXPENSE	\$141,525	\$141,525	\$141,525	\$141,525	\$141,525	\$707,625
52							
53	HSA #3						
54							

	A	B	C	D	E	F	G
1				Appendix B, Page 1			
2				Document Date:	2-Nov-18		
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY						
4	BY PROGRAM						
5	Contractor's Name			Contract Term			
6	TNDC Subcontractor: NCPHS			July 1, 2019 - June 30, 2024			
7	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification						
8	If modification, Effective Date of Mod. No. of Mod.			1.00			
9	Program: Rental Assistance Demonstration - 430 Turk Street						TOTAL
10	Budget Reference Page No.(s)						
11	Program Term	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
12	Human Services Agency Expenditures						
13	Salaries & Benefits	\$53,618	\$53,618	\$53,618	\$53,618	\$53,618	\$268,090
14	Operating Expense	\$10,395	\$10,395	\$10,395	10,395	10,395	\$51,975
15	Capital Expenditure	0		\$0			\$0
16	Subtotal	\$64,013	\$64,013	\$64,013	\$64,013	\$64,013	\$320,065
17	Indirect Percentage (%)	4.50%	4.50%	4.50%	4.50%	4.50%	
18	TNDC Indirect Cost	\$2,881	\$2,881	\$2,881	\$2,881	\$2,881	\$14,405
19	Total HSA Expenditures	\$66,894	\$66,894	\$66,894	\$66,894	\$66,894	\$334,470
20	Developer Match Expenditures						
21	Salaries & Benefits	\$59,080	\$59,080	\$59,080	\$59,080	\$59,080	\$295,400
22	Operating Expense	\$18,432	\$18,432	18,432	18,432	18,432	\$92,160
23	Capital Expenditure	\$0		0			\$0
24	Subtotal	\$77,512	\$77,512	\$77,512	\$77,512	\$77,512	\$387,560
25	Indirect Percentage (%)	4.50%	4.50%	4.50%	4.50%	4.50%	
26	TNDC Indirect Cost	\$3,488	\$3,488	\$3,488	\$3,488	\$3,488	\$17,440
27	Total Developer Expenditures	\$81,000	\$81,000	\$81,000	\$81,000	\$81,000	\$405,000
28							
29	Total HSA and Developer Expenditures	\$147,894	\$147,894	\$147,894	\$147,894	\$147,894	\$739,470
30	HSA Revenues						
31	Local General Fund	\$66,894	\$66,894	\$66,894	\$66,894	\$66,894	\$334,470
32							\$0
33							\$0
34							\$0
35							\$0
36							\$0
37							\$0
38							\$0
39	TOTAL HSA REVENUES	\$66,894	\$66,894	\$66,894	\$66,894	\$66,894	\$334,470
40	Developer Revenues						
41	TNDC Match Funds	\$81,000	\$81,000	\$81,000	\$81,000	\$81,000	\$405,000
42							\$0
43							\$0
44							\$0
45	Total Developer Revenues	\$81,000	\$81,000	\$81,000	\$81,000	\$81,000	\$405,000
46	Total Revenues	\$147,894	\$147,894	\$147,894	\$147,894	\$147,894	\$739,470
47	Full Time Equivalent (FTE)						
49	Prepared by:	Paul Carney	Telephone No.	415 358-3945	Date	Nov. 2, 2019	
50	HSA-CO Review Signature: _____						
51	HSA #1						
52							

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Appendix B, Page 3														1/0/1900
2	Document Date:														
3															
4	Contractor's Name:														
5	TNDC Subcontractor: NCPHS														
6															
7															
8	Operating Expense Detail														
9															
10	HSA Expenditure Category	TERM	Human Services Agency 7/1/19-6/30/20	Human Services Agency 7/1/20-6/30/21	Human Services Agency 7/1/21-6/30/22	Human Services Agency 7/1/22-6/30/23	Human Services Agency 7/1/23-6/30/24	TOTAL 7/1/19-6/30/24							
11	Rental of Property		\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	5,000							
12	Telephone and Office Furniture							\$0							
13	Program/Office Supplies		\$3,830	\$3,830	\$3,830	\$3,830	\$3,830	\$19,150							
14	Utilities (Electricity, Water, Sewer, Gas, Phone)		\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$12,500							
15	Printing and Reproduction		\$60	\$60	\$60	\$60	\$60	\$300							
16	Insurance							\$0							
17	Staff Travel (Local & Out of Town)		\$500	\$500	\$500	\$500	\$500	\$2,500							
18	Law Library							\$0							
19	Membership/Dues							\$0							
20	Rental of Equipment							\$0							
21	Senior Right Bulletin							\$0							
22								\$0							
23	Staff Training							\$0							
24	Sub-Contractor (NCPHS)							\$0							
25	OTHER							\$0							
26	Language Line/Translation Services		\$1,500	\$1,500	\$1,500	\$1,500	\$1,500	\$7,500							
27	Pangea/AASC Database		\$205	\$205	\$205	\$205	\$205	\$1,025							
28	Staff Training		\$800	\$800	\$800	\$800	\$800	\$4,000							
29	Staff Recognition							\$0							
30								\$0							
31	TOTAL HSA OPERATING EXPENSE		\$10,395	\$10,395	\$10,395	\$10,395	\$10,395	\$51,975							
32															
33	Developer Match Operating Expense														
34	Staff Travel							\$0							
35	Telephone and Furniture							\$0							
36	Office Supplies, Postage							\$0							
37	Printing and Reproduction							\$0							
38	Program Supplies							\$0							
39	Law Library							\$0							
40	Membership/Dues							\$0							
41	Rental of Equipment							\$0							
42	Volunteer Expenses (Receptionist/intake)							\$0							
43	Translation Services/Language Line							\$0							
44	Educational Programs/LCSW/Other Outside Services							\$0							
45	Charting							\$0							
46	Fringe Benefits Cost above 35% cap		\$1,970	\$1,970	\$1,970	\$1,970	\$1,970	\$9,850							
47	Sub-Contractor (NCPHS Indirect Expense) - includes NCPHS corporate costs for: Payroll Processing, Billing, Accounts Payable, Financial Reporting, Audit, Human Resources, IT		\$16,462	\$16,462	\$16,462	\$16,462	\$16,462	\$82,310							
48								\$0							
49	TOTAL DEVELOPER OPERATING EXPENSE		\$18,432	\$18,432	\$18,432	\$18,432	\$18,432	\$92,160							
50								\$0							
51	TOTAL OPERATING EXPENSE		\$28,827	\$28,827	\$28,827	\$28,827	\$28,827	\$144,135							
52															
53	HSA #3														
54															

APPENDIX A

AGREEMENT BETWEEN THE SAN FRANCISCO DEPARTMENT OF AGING AND ADULT SERVICES AND TENDERLOIN NEIGHBORHOOD DEVELOPMENT CORPORATION RAD Housing Support Services at Rosa Parks Senior Housing (1251 Turk Street) Grant Term – July 1, 2019 through June 30, 2024

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 older adults 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.
Economic Mobility Activities	Any activity that may improve and/or maintain tenants' financial stability (e.g. workshop on how to save money, learn how to balance a check, presentation about credit cards and debt, etc.)
Grantee	Tenderloin Neighborhood Development Corporation
Health and Wellness Services	Any service that supports and/or promotes tenants' health and well-being (i.e. Adult Day Health, nutrition programs, free health screenings, DAAS services, etc.)
Older Adults	Person who is 62 years and older
RAD	Rental Assistance Demonstration

III. Target Population

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

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- Grantee will be compliant with laws related to confidentiality and privacy, including the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement. If Grantee is additionally a Business Associate, please refer to Business Associate 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 is responsible for program language capacity reflective of the tenant population served to best provide culturally appropriate services.
- Grantee will conduct an annual survey measuring program outcomes and whether tenants felt services effectively made an impact.
- 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 submit aggregate demographic information, including Sexual Orientation and Gender Identity (SOGI) data, annually to DAAS.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

Service objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- 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). Types of activities annually must be at least 10% trainings/workshops, 25% health and wellness related, and 65% all other.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will outreach to 100% unduplicated tenants annually.

VIII. Outcome Objectives

Outcome objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the annual survey will feel “strongly” or “very strongly” about being connected and involved in their tenant/resident community. Grantee may use the following standardized question: “How strongly do you feel 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 resources improving their health and wellness. At least 50% of unduplicated tenant participating in the annual survey will “agree” or “highly agree” that they have better access to resources that improve their health and wellness. Grantee may use the following standardized question: “Do you have better access to resources 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 have maintained or have obtained a 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 that were outreached annually.
 - 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 resources 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:

Esperanza.Zapien@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. Program Monitoring: 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. 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.

	A	B	C	D	E	F	G
1				Appendix B, Page 1			
2				Document Date:	2-Nov-18		
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY						
4	BY PROGRAM						
5	Contractor's Name			Contract Term			
6	Tenderloin Neighborhood Development Corporation			July 1, 2019 - June 30, 2024			
7	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification						
8	If modification, Effective Date of Mod. No. of Mod.			1.00			
9	Program: Rental Assistance Demonstration - Rosa Parks						TOTAL
10	Budget Reference Page No.(s)						
11	Program Term	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
12	Human Services Agency Expenditures						
13	Salaries & Benefits	\$0	\$0	\$0	\$0	\$0	\$0
14	Operating Expense	\$133,695	\$133,695	\$133,695	\$133,695	\$133,695	\$668,476
15	Capital Expenditure	\$0	\$0	\$0	\$0	\$0	\$0
16	Subtotal	\$133,695	\$133,695	\$133,695	\$133,695	\$133,695	\$668,476
17	Indirect Percentage (%)	4.00%	4.00%	4.00%	4.00%	4.00%	
18	Indirect Cost	\$5,348	\$5,348	\$5,348	\$5,348	\$5,348	\$26,739
19	Total HSA Expenditures	\$139,043	\$139,043	\$139,043	\$139,043	\$139,043	\$695,215
20	Developer Match Expenditures						
21	Salaries & Benefits	\$0	\$0	\$0	\$0	\$0	\$0
22	Operating Expense	\$155,769	\$155,769	\$155,769	\$155,769	\$155,769	\$778,846
23	Capital Expenditure	\$0	\$0	\$0	\$0	\$0	\$0
24	Subtotal	\$155,769	\$155,769	\$155,769	\$155,769	\$155,769	\$778,846
25	Indirect Percentage (%)	4.00%	4.00%	4.00%	4.00%	4.00%	
26	Indirect Cost	\$6,231	\$6,231	\$6,231	\$6,231	\$6,231	\$31,155
27	Total Developer Expenditures	\$162,000	\$162,000	\$162,000	\$162,000	\$162,000	\$810,000
28							
29	Total HSA and Developer Expenditures	\$301,043	\$301,043	\$301,043	\$301,043	\$301,043	\$1,505,215
30	HSA Revenues						
31	Local General Fund	\$139,043	\$139,043	\$139,043	\$139,043	\$139,043	\$695,215
32							
33							
34							
35							
36							
37							
38							
39	TOTAL HSA REVENUES	\$139,043	\$139,043	\$139,043	\$139,043	\$139,043	\$695,215
40	Developer Revenues						
41	Developer Match Funds	\$162,000	\$162,000	\$162,000	\$162,000	\$162,000	\$810,000
42							
43							
44							
45	Total Developer Revenues	\$162,000	\$162,000	\$162,000	\$162,000	\$162,000	\$810,000
46	Total Revenues	\$301,043	\$301,043	\$301,043	\$301,043	\$301,043	\$1,505,215
47	Full Time Equivalent (FTE)	3.75	3.75	3.75	3.75	3.75	
49	Prepared by:	Paul Carney	Telephone No.	415 358-3945	Date	Nov. 2, 2019	
50	HSA-CO Review Signature: _____						
51	HSA #1						
52							

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Appendix B, Page 3														1/0/1900
2	Document Date:														
3															
4	Contractor's Name:														
5	Tenderloin Neighborhood Development Corporation														
6															
7	Operating Expense Detail														
8															
9															
10	HSA Expenditure Category	TERM	Human Services Agency	TOTAL											
11		7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24								
11	Rental of Property							0							
12	Telephone and Office Furniture							\$0							
13	Program/Office Supplies							\$0							
14	Utilities (Electricity, Water, Sewer, Gas, Phone)							\$0							
15	Printing and Reproduction							\$0							
16	Insurance							\$0							
17	Staff Travel (Local & Out of Town)							\$0							
18	Law Library							\$0							
19	Membership/Dues							\$0							
20	Rental of Equipment							\$0							
21	Senior Right Bulletin							\$0							
22								\$0							
23	Staff Training							\$0							
24	Sub-Contractor (NCPHS)		133,695	133,695	133,695	133,695	133,695	668,476							
25															
26															
27															
28															
29															
30															
31	TOTAL HSA OPERATING EXPENSE		\$133,695	\$133,695	\$133,695	\$133,695	\$133,695	\$668,476							
32															
33	Developer Match Operating Expense														
34	Staff Travel							\$0							
35	Telephone and Furniture							\$0							
36	Office Supplies, Postage							\$0							
37	Printing and Reproduction							\$0							
38	Program Supplies							\$0							
39	Law Library							\$0							
40	Membership/Dues							\$0							
41	Rental of Equipment							\$0							
42	Volunteer Expenses (Receptionist/intake)							\$0							
43	Translation Services/Language Line							\$0							
44	Educational Programs/LCSW/Other Outside Services							\$0							
45	Charting							\$0							
46	Staff Training							\$0							
47	Sub-Contractor (NCPHS)		155,769	155,769	155,769	155,769	155,769	778,846							
48								\$0							
49	TOTAL DEVELOPER OPERATING EXPENSE		\$155,769	\$155,769	\$155,769	\$155,769	\$155,769	\$778,846							
50								\$0							
51	TOTAL OPERATING EXPENSE		\$289,464	\$289,464	\$289,464	\$289,464	\$289,464	\$1,447,322							
52															
53	HSA #3														
54															

	A	B	C	D	E	F	G
1				Appendix B, Page 1			
2				Document Date:	2-Nov-18		
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY						
4	BY PROGRAM						
5	Contractor's Name			Contract Term			
6	TNDC Subcontractor: NCPHS			July 1, 2019 - June 30, 2024			
7	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification						
8	If modification, Effective Date of Mod. No. of Mod.			1.00			
9	Program: Rental Assistance Demonstration - Rosa Parks						TOTAL
10	Budget Reference Page No.(s)						
11	Program Term	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
12	Human Services Agency Expenditures						
13	Salaries & Benefits	\$112,927	\$112,927	\$112,927	\$112,927	\$112,927	\$564,635
14	Operating Expense	\$20,768	\$20,768	\$20,768	20,768	20,768	\$103,840
15	Capital Expenditure	0		\$0			\$0
16	Subtotal	\$133,695	\$133,695	\$133,695	\$133,695	\$133,695	\$668,476
17	Indirect Percentage (%)	4.00%	4.00%	4.00%	4.00%	4.00%	
18	TNDC Indirect Cost	\$5,348	\$5,348	\$5,348	\$5,348	\$5,348	\$26,739
19	Total HSA Expenditures	\$139,043	\$139,043	\$139,043	\$139,043	\$139,043	\$695,215
20	Developer Match Expenditures						
21	Salaries & Benefits	\$118,012	\$118,012	\$118,012	\$118,012	\$118,012	\$590,059
22	Operating Expense	\$37,757	\$37,757	\$37,757	\$37,757	\$37,757	\$188,785
23	Capital Expenditure	\$0		0			\$0
24	Subtotal	\$155,769	\$155,769	\$155,769	\$155,769	\$155,769	\$778,845
25	Indirect Percentage (%)	4.00%	4.00%	4.00%	4.00%	4.00%	
26	TNDC Indirect Cost	\$6,231	\$6,231	\$6,231	\$6,231	\$6,231	\$31,155
27	Total Developer Expenditures	\$162,000	\$162,000	\$162,000	\$162,000	\$162,000	\$810,000
28							
29	Total HSA and Developer Expenditures	\$301,043	\$301,043	\$301,043	\$301,043	\$301,043	\$1,505,215
30	HSA Revenues						
31	Local General Fund	\$139,043	\$139,043	\$139,043	\$139,043	\$139,043	\$695,215
32							\$0
33							\$0
34							\$0
35							\$0
36							\$0
37							\$0
38							\$0
39	TOTAL HSA REVENUES	\$139,043	\$139,043	\$139,043	\$139,043	\$139,043	\$695,215
40	Developer Revenues						
41	TNDC Match Funds	\$162,000	\$162,000	\$162,000	\$162,000	\$162,000	\$810,000
42							\$0
43							\$0
44							\$0
45	Total Developer Revenues	\$162,000	\$162,000	\$162,000	\$162,000	\$162,000	\$810,000
46	Total Revenues	\$301,042	\$301,042	\$301,042	\$301,042	\$301,042	\$1,505,215
47	Full Time Equivalent (FTE)	3.75	3.75	3.75	3.75	3.75	
49	Prepared by:	Paul Carney	Telephone No.	415 358-3945	Date	Nov. 2, 2019	
50	HSA-CO Review Signature:	_____					
51	HSA #1						
52							

Contractor's Name:
TNDC Subcontractor: NCPHS

Operating Expense Detail

	Human Services Agency	TOTAL				
HSA Expenditure Category	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
11 Rental of Property	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	5,000
12 Telephone and Office Furniture	\$700	\$700	\$700	\$700	\$700	\$3,500
13 Program/Office Supplies	\$6,351	\$6,351	\$6,351	\$6,351	\$6,351	\$31,755
14 Utilities (Electricity, Water, Sewer, Gas, Phone)	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$12,500
15 Printing and Reproduction	\$200	\$200	\$200	\$200	\$200	\$1,000
16 Insurance						\$0
17 Staff Travel (Local & Out of Town)	\$700	\$700	\$700	\$700	\$700	\$3,500
18 Law Library						\$0
19 Membership/Dues						\$0
20 Rental of Equipment						\$0
21 Senior Right Bulletin						\$0
22						\$0
23 Staff Training						\$0
24 Sub-Contractor (NCPHS)						\$0
25 OTHER						\$0
26 Language Line/Translation Services	\$2,900	\$2,900	\$2,900	\$2,900	\$2,900	\$14,500
27 Pangea/AASC Database	\$717	\$717	\$717	\$717	\$717	\$3,585
28 Staff Training + Recruitment	\$3,650	\$3,650	\$3,650	\$3,650	\$3,650	\$18,250
29 Other Outside Services	\$2,050	\$2,050	\$2,050	\$2,050	\$2,050	\$10,250
30						\$0
31 TOTAL HSA OPERATING EXPENSE	\$20,768	\$20,768	\$20,768	\$20,768	\$20,768	\$103,840
32						
33 Developer Match Operating Expense						\$0
34 Staff Travel						\$0
35 Telephone and Furniture						\$0
36 Office Supplies, Postage						\$0
37 Printing and Reproduction						\$0
38 Program Supplies						\$0
39 Law Library						\$0
40 Membership/Dues						\$0
41 Rental of Equipment						\$0
42 Volunteer Expenses (Receptionist/intake)						\$0
43 Translation Services/Language Line						\$0
44 Educational Programs/LCSW/Other Outside Services						\$0
45 Chariting						\$0
46 Fringe Benefits Cost above 35% cap	\$20,332	\$20,332	\$20,332	\$20,332	\$20,332	\$101,660
47 Sub-Contractor (NCPHS Indirect Expense) - includes NCPHS corporate costs for: Payroll Processing, Billing, Accounts Payable, Financial Reporting, Audit, Human Resources, IT	\$17,425	\$17,425	\$17,425	\$17,425	\$17,425	\$87,125
48						\$0
49 TOTAL DEVELOPER OPERATING EXPENSE	\$37,757	\$37,757	\$37,757	\$37,757	\$37,757	\$188,785
50						\$0
51 TOTAL OPERATING EXPENSE	\$58,525	\$58,525	\$58,525	\$58,525	\$58,525	\$292,625
52						
53 HSA #3						
54						

APPENDIX A

AGREEMENT BETWEEN THE SAN FRANCISCO DEPARTMENT OF AGING AND ADULT SERVICES AND TENDERLOIN NEIGHBORHOOD DEVELOPMENT CORPORATION RAD Housing Support Services at 320 & 330 Clementina Street Grant Term – July 1, 2019 through June 30, 2024

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 older adults 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.
Economic Mobility Activities	Any activity that may improve and/or maintain tenants' financial stability (e.g. workshop on how to save money, learn how to balance a check, presentation about credit cards and debt, etc.)
Grantee	Tenderloin Neighborhood Development Corporation
Health and Wellness Services	Any service that supports and/or promotes tenants' health and well-being (i.e. Adult Day Health, nutrition programs, free health screenings, DAAS services, etc.)
Older Adults	Person who is 62 years and older
RAD	Rental Assistance Demonstration

III. Target Population

Older adults and adults with disabilities residing in San Francisco RAD converted housing development units at 320 and 330 Clementina 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 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.
- 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 320 and 330 Clementina Street, Monday through Friday, during regular office hours of 8 a.m. to 4:30 p.m., excluding holidays.

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- Grantee will be compliant with laws related to confidentiality and privacy, including the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement. If Grantee is additionally a Business Associate, please refer to Business Associate 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 is responsible for program language capacity reflective of the tenant population served to best provide culturally appropriate services.
- Grantee will conduct an annual survey measuring program outcomes and whether tenants felt services effectively made an impact.
- 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 submit aggregate demographic information, including Sexual Orientation and Gender Identity (SOGI) data, annually to DAAS.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

Service objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- 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). Types of activities annually must be at least 10% trainings/workshops, 25% health and wellness related, and 65% all other.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will outreach to 100% unduplicated tenants annually.

VIII. Outcome Objectives

Outcome objectives will be re-evaluated annually and may be amended for relevance and appropriateness based on RAD site trends and service needs.

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the annual survey will feel “strongly” or “very strongly” about being connected and involved in their tenant/resident community. Grantee may use the following standardized question: “How strongly do you feel 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 resources improving their health and wellness. At least 50% of unduplicated tenant participating in the annual survey will “agree” or “highly agree” that they have better access to resources that improve their health and wellness. Grantee may use the following standardized question: “Do you have better access to resources 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 have maintained or have obtained a 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 that were outreached annually.
 - 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 resources 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:

Esperanza.Zapien@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. Program Monitoring: 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. 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.

	A	B	C	D	E	F	G
1	Appendix B, Page 1						
2	Document Date:						
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY						
4	BY PROGRAM						
5	Contractor's Name				Contract Term		
6	Tenderloin Neighborhood Development Corporation				July 1, 2019 - June 30, 2024		
7	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification						
8	If modification, Effective Date of Mod. No. of Mod.				1.00		
9	Program: Rental Assistance Demonstration - Clementina						TOTAL
10	Budget Reference Page No.(s)						
11	Program Term	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
12	Human Services Agency Expenditures						
13	Salaries & Benefits	\$0	\$0	\$0	\$0	\$0	\$0
14	Operating Expense	\$277,066	\$277,066	\$277,066	\$277,066	\$277,066	\$1,385,332
15	Capital Expenditure	\$0	\$0	\$0	\$0	\$0	\$0
16	Subtotal	\$277,066	\$277,066	\$277,066	\$277,066	\$277,066	\$1,385,332
17	Indirect Percentage (%)	4.00%	4.00%	4.00%	4.00%	4.00%	
18	Indirect Cost	\$11,083	\$11,083	\$11,083	\$11,083	\$11,083	\$55,413
19	Total HSA Expenditures	\$288,149	\$288,149	\$288,149	\$288,149	\$288,149	\$1,440,745
20	Developer Match Expenditures						
21	Salaries & Benefits	\$0	\$0	\$0	\$0	\$0	\$0
22	Operating Expense	\$155,769	\$155,769	\$155,769	\$155,769	\$155,769	\$778,846
23	Capital Expenditure	\$0	\$0	\$0	\$0	\$0	\$0
24	Subtotal	\$155,769	\$155,769	\$155,769	\$155,769	\$155,769	\$778,846
25	Indirect Percentage (%)	4.00%	4.00%	4.00%	4.00%	4.00%	
26	Indirect Cost	\$6,231	\$6,231	\$6,231	\$6,231	\$6,231	\$31,154
27	Total Developer Expenditures	\$162,000	\$162,000	\$162,000	\$162,000	\$162,000	\$810,000
28							
29	Total HSA and Developer Expenditures	\$450,149	\$450,149	\$450,149	\$450,149	\$450,149	\$2,250,745
30	HSA Revenues						
31	Local General Fund	\$288,149	\$288,149	\$288,149	\$288,149	\$288,149	\$1,440,745
32							
33							
34							
35							
36							
37							
38							
39	TOTAL HSA REVENUES	\$288,149	\$288,149	\$288,149	\$288,149	\$288,149	\$1,440,745
40	Developer Revenues						
41	Developer Match Funds	\$162,000	\$162,000	\$162,000	\$162,000	\$162,000	\$810,000
42							
43							
44							
45	Total Developer Revenues	\$162,000	\$162,000	\$162,000	\$162,000	\$162,000	\$810,000
46	Total Revenues	\$450,149	\$450,149	\$450,149	\$450,149	\$450,149	\$2,250,745
47	Full Time Equivalent (FTE)	3.75	3.75	3.75	3.75	3.75	
49	Prepared by:	Paul Carney	Telephone No.	415 358-3945	Date	Nov. 2, 2019	
50	HSA-CO Review Signature: _____						
51	HSA #1						
52							

	A	B	C	D	E	F	G
1	Appendix B, Page 1						
2	Document Date:						
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY						
4	BY PROGRAM						
5	Contractor's Name				Contract Term		
6	TNDC Subcontractor: NCPHS				July 1, 2019 - June 30, 2024		
7	(Check One) New ___ Renewal X Modification						
8	If modification, Effective Date of Mod. No. of Mod.				1.00		
9	Program: Rental Assistance Demonstration - Clementina						TOTAL
10	Budget Reference Page No.(s)						
11	Program Term	7/1/19-6/30/20	7/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/19-6/30/24
12	Human Services Agency Expenditures						
13	Salaries & Benefits	\$262,743	\$262,743	\$262,743	\$262,743	\$262,743	\$1,313,715
14	Operating Expense	\$14,323	\$14,323	\$14,323	14,323	14,323	\$71,615
15	Capital Expenditure	0		\$0			\$0
16	Subtotal	\$277,066	\$277,066	\$277,066	\$277,066	\$277,066	\$1,385,332
17	Indirect Percentage (%)	4.00%	4.00%	4.00%	4.00%	4.00%	
18	TNDC Indirect Cost	\$11,083	\$11,083	\$11,083	\$11,083	\$11,083	\$55,415
19	Total HSA Expenditures	\$288,149	\$288,149	\$288,149	\$288,149	\$288,149	\$1,440,745
20	Developer Match Expenditures						
21	Salaries & Benefits	\$102,613	\$102,613	\$102,613	\$102,613	\$102,613	\$513,067
22	Operating Expense	\$53,156	\$53,156	\$53,156	\$53,156	\$53,156	\$265,780
23	Capital Expenditure	\$0		0			\$0
24	Subtotal	\$155,769	\$155,769	\$155,769	\$155,769	\$155,769	\$778,846
25	Indirect Percentage (%)	4.00%	4.00%	4.00%	4.00%	4.00%	
26	TNDC Indirect Cost	\$6,231	\$6,231	\$6,231	\$6,231	\$6,231	\$31,154
27	Total Developer Expenditures	\$162,000	\$162,000	\$162,000	\$162,000	\$162,000	\$810,000
28							
29	Total HSA and Developer Expenditures	\$450,149	\$450,149	\$450,149	\$450,149	\$450,149	\$2,250,745
30	HSA Revenues						
31	Local General Fund	\$288,149	\$288,149	\$288,149	\$288,149	\$288,149	\$1,440,745
32							\$0
33							\$0
34							\$0
35							\$0
36							\$0
37							\$0
38							\$0
39	TOTAL HSA REVENUES	\$288,149	\$288,149	\$288,149	\$288,149	\$288,149	\$1,440,745
40	Developer Revenues						
41	TNDC Match Funds	\$162,000	\$162,000	\$162,000	\$162,000	\$162,000	\$810,000
42							\$0
43							\$0
44							\$0
45	Total Developer Revenues	\$162,000	\$162,000	\$162,000	\$162,000	\$162,000	\$810,000
46	Total Revenues	\$450,149	\$450,149	\$450,149	\$450,149	\$450,149	\$2,250,745
47	Full Time Equivalent (FTE)	3.75	3.75	3.75	3.75	3.75	
49	Prepared by:	Paul Carney	Telephone No.	415 358-3945	Date	Nov. 2, 2019	
50	HSA-CO Review Signature:	_____					
51	HSA #1						
52							

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Appendix B, Page 3														1/0/1900
2	Document Date:														
3															
4	Contractor's Name:														
5	TNDC Subcontractor: NCPHS														
6															
7	Operating Expense Detail														
8															
9															
10	HSA Expenditure Category	TERM	Human Services Agency 7/1/19-6/30/20	Human Services Agency 7/1/20-6/30/21	Human Services Agency 7/1/21-6/30/22	Human Services Agency 7/1/22-6/30/23	Human Services Agency 7/1/23-6/30/24	TOTAL 7/1/19-6/30/24							
11	Rental of Property														0
12	Telephone and Office Furniture														\$0
13	Program/Office Supplies		\$5,126	\$5,126	\$5,126	\$5,126	\$5,126	\$25,630							
14	Utilities (Electricity, Water, Sewer, Gas, Phone)		\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$12,500							
15	Printing and Reproduction		\$80	\$80	\$80	\$80	\$80	\$400							
16	Insurance							\$0							
17	Staff Travel (Local & Out of Town)		\$400	\$400	\$400	\$400	\$400	\$2,000							
18	Law Library							\$0							
19	Membership/Dues							\$0							
20	Rental of Equipment		\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$5,000							
21	Senior Right Bulletin							\$0							
22								\$0							
23	Staff Training		\$1,600	\$1,600	\$1,600	\$1,600	\$1,600	\$8,000							
24	Sub-Contractor (NCPHS)							\$0							
25	OTHER							\$0							
26	Language Line/Translation Services		\$1,700	\$1,700	\$1,700	\$1,700	\$1,700	\$8,500							
27	Pangea/AASC Database		\$717	\$717	\$717	\$717	\$717	\$3,585							
28	Outside Services - Akioo		\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$6,000							
29	Staff Recognition							\$0							
30								\$0							
31	TOTAL HSA OPERATING EXPENSE		\$14,323	\$14,323	\$14,323	\$14,323	\$14,323	\$71,615							
32															
33	Developer Match Operating Expense														
34	Staff Travel							\$0							
35	Telephone and Furniture							\$0							
36	Office Supplies, Postage							\$0							
37	Printing and Reproduction							\$0							
38	Program Supplies							\$0							
39	Law Library							\$0							
40	Membership/Dues							\$0							
41	Rental of Equipment							\$0							
42	Volunteer Expenses (Receptionist/intake)							\$0							
43	Translation Services/Language Line							\$0							
44	Educational Programs/LCSW/Other Outside Services							\$0							
45	Charting							\$0							
46	Staff Training							\$0							
47	Sub-Contractor (NCPHS Indirect Expense) - includes NCPHS corporate costs for: Payroll Processing, Billing, Accounts Payable, Financial Reporting, Audit, Human Resources, IT		\$53,156	\$53,156	\$53,156	\$53,156	\$53,156	\$265,780							
48								\$0							
49	TOTAL DEVELOPER OPERATING EXPENSE		\$53,156	\$53,156	\$53,156	\$53,156	\$53,156	\$265,780							
50								\$0							
51	TOTAL OPERATING EXPENSE		\$67,479	\$67,479	\$67,479	\$67,479	\$67,479	\$337,995							
52															
53	HSA #3														
54															