



MEMORANDUM

TO: HUMAN SERVICES COMMISSION

THROUGH: TRENT RHORER, EXECUTIVE DIRECTOR

FROM: NOELLE SIMMONS, DEPUTY DIRECTOR
JOHN TSUTAKAWA, DIRECTOR OF CONTRACTS *2/6/1*

DATE: SEPTEMBER 22, 2017

SUBJECT: GRANT MODIFICATION: **HAMILTON FAMILIES** for HOUSING CALWORKS LOCATOR SERVICES AND HOUSING SERVICES CONNECTOR

	<u>Current</u>	<u>Modification</u>	<u>Revised</u>	<u>Contingency</u>	<u>Total</u>
GRANT TERM:	6/1/2016 – 6/30/2020	9/1/2017 – 6/30/18			
TOTAL GRANT AMOUNT:	\$5,851,171	\$1,415,350	\$7,266,521	\$726,652	\$7,993,173
ANNUAL AMOUNT:	FY 16/17	Revised FY 17/18	FY 18/19	FY 19/20	
	\$1,462,492	\$2,879,045	\$1,462,492	\$1,462,492	
Funding Source	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
MODIFICATION	\$169,842	\$438,759	\$806,749	\$726,652	\$7,993,173
FUNDING:					
PERCENTAGE:	12%	31%	57%		

The Department of Human Services (DHS) requests authorization to modify the existing grant with Hamilton Families for the provision of housing locator, housing connector, housing stabilization, and case management services to CalWORKs participants for the period of September 1, 2017 to June 30, 2017 in an additional \$1,415,350 plus 10% contingency for a revised total grant amount not to exceed \$7,993,173. The purpose of this modification is to provide services to an additional 36 families during the 2017-18 fiscal year.

Background

Senate Bill (SB) 855 (Chapter 29, Statutes of 2014) allocated State funding for housing supports to homeless CalWORKs recipients. Homelessness has been identified as one of the major barriers that impact the CalWORKs families' ability to participate in required activities and meet program requirements that leads toward the path of self-sufficiency.

259 CalWORKs families have been placed in permanent housing through CalWORKs Housing Support Program services to-date. This modification expects to house an additional 30 families during the 2017-18 fiscal year while continuing to provide housing support through landlord mediation, as needed, for those already housed. Hamilton Family Center also provides the ongoing case management for Out-of-County housing placements, managing the rentals subsidies and supportive services.

Due to the lack of affordable housing within San Francisco, many families are placed in housing out of county. This has led to discussions on regional coordination of the CalWORKs Housing Support program and may alter the way the current program is administered.

Services to be Provided

Grantee will continue to provide CalWORKs families living in shelters, transitional housing programs, and families who are at risk of losing their permanent housing, with housing locator and housing connector services to obtain and retain permanent housing.

Housing Locator Services

Identifies units and provides unit descriptions for the housing match and placement process. Grantee will identify and establish a current list of available housing units for this program within the City and County of San Francisco and surrounding Bay Area Counties (within the Bay Area's nine counties).

Housing Connector Services

Works with Housing Locator Services, the CalWORKs Social Worker, and CalWORKs families to match and place the families with available housing units and assists families throughout the lease application and placement process.

Housing Stabilization and Case Management Services

Provides ongoing intensive housing case management services including regular meetings with participants to track progress towards employment and housing goals, and referrals to other local supportive services. The majority of this grant modification will fund the direct pass-through subsidies to clients for various housing-related costs, such as move-in assistance, rental subsidies for up to one year, and household goods. In addition to these services, the modification will support expanded case management services for all program clients.

Hamilton Family Center will provide services primarily at 225 Hyde Street, San Francisco, as well as other locations in the Bay Area.

This modification will enable provision of the aforementioned services to an additional 36 families during the 2017-18 fiscal year.

Selection

Contractor was selected through Request for Proposals #623 for CalWORKs Housing Broker Services and Request for Proposals #626 for CalWORKs Housing Coordinator Services. Both RFPs were competitively bid in October 2014.

Funding

Funding for this grant modification is provided by a combination of Federal, State, and Local funds.

ATTACHMENTS

Appendix A-1, Scope of Services

Appendix B-1, Budget

APPENDIX A-1

AGREEMENT BETWEEN
SAN FRANCISCO DEPARTMENT OF HUMAN SERVICES
AND HAMILTON FAMILIES
CalWORKs Housing Locator, Housing Connector, and Housing Stabilization
July 1, 2016 – June 30, 2020
Revised 9/1/2017

I. Purpose of Grant

To provide CalWORKs families meeting the California Department of Social Services (CDSS) definition of homelessness, with housing locator, housing connector, *and housing stabilization and case management services* to obtain and retain permanent housing.

II. Definitions

CalWORKs	California Work Opportunity and Responsibility to Kids welfare-to-work program for families receiving Temporary Aid to Needy Families (TANF) cash aid.
CWHSP	CalWORKs Housing Support Program, an integrated program of HSA staff and contracted services to place Homeless CalWORKs participants in permanent housing
Grantee	Hamilton Families (HF)
Homeless	CDSS definition of homeless under the Housing Support Program, currently: <ol style="list-style-type: none">1) Lacking a fixed and regular nighttime residence; or2) Having a primary nighttime residence that is a supervised publicly or privately operated shelter designed to provide temporary living accommodations; or3) Residing in a public or private place not designed for, or ordinarily used as, a regular sleeping accommodation for human beings; or4) In receipt of a judgment for eviction, as ordered by a court.
HSA	Human Services Agency of the City and County of San Francisco, also the Department
SW	Human Service Agency Social Worker staff

III. Target Population

CalWORKs families as referred by HSA meeting the definition of Homelessness developed for this program by the California Department of Social Services as listed in Section II Definitions.

IV. Description of Services

Grantee Responsibilities:

Housing Locator Services

Contractor will provide unit identification and unit descriptions for housing match and placement process. Contractor will identify and establish a current list of available housing units for this program within the City and County of San Francisco and surrounding Bay Area Counties. This will involve:

- A. A systematic approach to searching for suitable units, using standard real estate networking listings and publications, landlord outreach, and other methods. This should result in a portfolio of units that vary in size reflective of the CalWORKs families' needs.
- B. Target housing search to neighborhoods where clients have a higher likelihood of successful stabilization based upon HSA Planning unit data analytics.**
- C. Maintaining a centralized, virtually accessible, listing of units with description and information on how to apply, within SF and the nine Bay Area surrounding counties, and other counties as appropriate, that is updated weekly and could be accessible to CalWORKs staff and assigned participants in the Housing Support Program.

Housing Connector Services

- A. Works with Housing Locator, the CalWORKs Social Workers, and CalWORKs families to match and place the families with available housing units and assists families throughout the lease application and placement process.
- B. Negotiates leases with landlords pertaining to families to be placed in their rental properties. Note: the lease needs to be signed prior to move-in and sent to the CWHSP within 5 days of receipt.
- C. Conducts and documents a pre-move-in inspection report of units considered for match and placement process to ensure basic habitability, safety and cleanliness, including pending repairs. Note: this report should include any needed documentation, such as photos, etc.
- D. In collaboration with the CalWORKs Social Worker and CalWORKs families, performs the appropriate housing matches between units and identified families, recommends housing options/solutions, and placement that includes making housing-related service referrals that lead to lease approval.
- E. Shows available units determined to be a match to families.
- F. Works with the CalWORKs Social Workers to identify, gather and coordinate issuances of approved move-in costs expenditures for families such as the deposit, first and last month's rent, furniture, etc. Assists families in applying for move-in assistance from other sources as appropriate.
- G. Directly pays for approved housing search (including credit checks, application fees, paying off debt to utility companies, assistance in correcting erroneous unlawful

detainers), and move-in costs, (security deposit, first, second, and last month's rent, furniture), and other costs related to these client activities that are approved by CalWORKs per HSP guidelines.

- H. Serves as the direct landlord liaison and communicates with the CalWORKs Social Workers.
- I. Coordinates process and collaborative effort focusing on the intensive beginning phase to match/place CalWORKs families with housing. This includes completing the housing application and assistance on obtaining required documentation, providing a unit move-in to-do list to the families, and completing the move-in checklist requirements for CalWORKs program documentation.
- J. Provides weekly progress report to the CalWORKs Social Worker on the status of families in the matching and placement process. After the housing placement and follow-up and retention service period, the housing services connector, may need to be involved again with the same families if there are problems with current housing retention that may include arbitrating conflicts with the landlord. This applies to all HSP families.
- K. Contractor will track leased units in a database, noting occupancy dates and lease terms, any changes in ownership or property management. Contractor will share that information with HSA on a monthly basis.

For HSP families' case managed by Hamilton Families:

- A. Provide ongoing, intensive housing case management until the family completes the CalWORKs Housing Support Program. ***Case management services to include:***
 - 1. ***At least monthly meetings with participants with face-to-face meetings during the first two months following placement and following meetings either in office, via phone/web or home visit depending upon participant need.***
 - 2. ***Provide referrals and a resource list to other local supportive services and linkages to employment***
 - 3. ***Establish quarterly housing goals with each family***
 - 4. ***Check in on and support client progress toward employment and increasing income.***
- B. ***Provides follow-up housing placement and retention services to all placed CalWORKs families until exit from the program.***
- C. Contractor will administer the rental subsidy for designated program participants and follow program guidelines for the increasing share of his or her monthly income towards the rent for families' case managed by Contractor.
- D. Contractor will monitor and document family CalWORKs eligibility on a monthly basis through 'MyBenefits CalWIN' or other HSA approved process. Income reported to Hamilton Case Manager must be verified.
- E. Verify client's ongoing CalWORKs eligibility monthly, and if discontinued, determine if client will continue receiving retention services under WtW and for how long.
- F. If applicable, verify clients ongoing WtW Retention Services monthly.

Department Responsibilities:

- A. CalWORKs Social Worker staff will work closely together with HF staff on matching and housing placement. All program participants will have access to a full array of wrap-around services through their CalWORKs Housing Social Worker.
- B. The CalWORKs Social Worker staff will provide the intensive housing case management directly to the CalWORKs Housing Support families participating in the program and residing in San Francisco or otherwise identified by HSA until the family successfully completes the CalWORKs housing program. Housing case management is not limited to related rental issues, such as payment and rental compliance to prevent eviction and housing retention. Other case management needs related to CalWORKs eligibility and employment services, such as employment, utilities, school, transportation, material needs, therapy or treatment, and other needs are also handled by the CalWORKs social workers.
- C. HSA will work towards the same outcome objectives as HF for those families case managed by CWHSP Social Workers.
- D. The CalWORKs program will evaluate income and rent obligations and the rental subsidy program administration. HSA will administer the rental subsidy for program participants after the move-in, and beginning with the third month's rent and follow program guidelines for the increasing share of his or her monthly income towards the rent for families' case managed by CalWORKs.
- E. Provide office/desk space for HF Staff while working at HSA site to better coordinate with CalWORKs staff.

V. Location and Time of Service

Grantee shall provide contracted services at Hamilton Families offices in San Francisco, other Hamilton locations, and at housing sites. HF staff will also work at CalWORKs offices as described above. Services are to be provided five days a week, between the hours of 9:00am and 5:00pm, some evenings and weekends, and at other times when necessary to best serve the needs of families. The nature of the Housing Locator and Housing Connector work will require extensive work in the community, including the surrounding counties.

VI. Service Objectives

The Grantee will meet the following Service Objectives:

- A. Provide Housing Locator and Housing Connector services to all referred CalWORKs families per year. Number of referrals made each year will be based on the agreed upon number of families to be placed in housing within the program year.
- B. Provide ongoing case management and direct rent subsidy payments to referred CalWORKs families placed out of county. In year 1 HF will serve 64 families; in *year 2, HF will serve 90 to 100 families annually.*
- C. *Families referred by HSA will move from intake to Housing Connector Services within 7 days from the date referred by the HSP unit.*
- D. Provider will communicate frequently with the CalWORKs program through emails, phone calls, and possibly web-based resources to disseminate information about housing resources, coordinate the matching of families to housing options, and navigate placement and retention in housing.

- E. Provide language capacity for service mirroring the needs of the CalWORKs population.

VII. Outcome Objectives

The Grantee will meet the following Outcome Objectives:

- A. Place 70 families in housing in year 1 and **60-70 families in housing in year 2**, with the families being placed in permanent housing in an average of 30 days from the start of their housing search
- B. 95% of families will remain stably housed 3 months after being housed.
- C. 85% of families placed who receive case management services from Hamilton Families will retain housing 9 months after housing placement.
- D. 80% of families in HSP who receive case management services from Hamilton Families that exit the program will exit to permanent housing
- E. 85% of families exiting HSP who receive case management services from Hamilton Families should not become homeless within a year.
- F. A minimum of 50% of HSP families served during a survey sample period shall complete a Client Satisfaction Survey. 80% of clients participating in the Client Satisfaction Survey will rate services as “Excellent” or “Good”. Grantees should use the following standardized question: “How would you rate the [specific services] Program overall?” The options should be “Excellent”, “Good”, “Fair” and “Poor”. This survey will be conducted by Hamilton Families staff according to HSA guidelines.
- G. CalWORKs Social Work and Employment Specialist staff shall complete a Client Satisfaction Survey. 80% of CalWORKs staff taking the Client Satisfaction Survey will rate services as “Excellent” or “Good”. Grantees should use the following standardized question: “How would you rate the [specific services] Program overall?” The options should be “Excellent”, “Good”, “Fair” and “Poor”.

VIII. Reporting Requirements

- A. Grantee will provide a weekly update report on the new Lease Agreements, the receipt of all other accounting expenses at time of move-in, the W-9 Tax information Form endorsed by the landlord/property manager, and other forms as needed.
- B. Grantee will provide a monthly report of activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives, including monitoring and documenting family CalWORKs eligibility with verification maintained in the case files for families case managed by Hamilton Families. Grantee will enter the quarterly metrics in the CARBON database by the 15th of the following month.
- C. Grantee will provide the CWHSP State Data report monthly by email to the Program Monitor by the 10th of the month. Grantee will provide monthly employment status in the State data report.
- D. Grantee will provide a quarterly report of activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. Grantee will enter the quarterly



metrics in the CARBON database by the 15th of the month following the end of the quarter.

- E. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VI & VII - Service and 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.
- F. Grantee will provide Ad Hoc reports as required by the Department.
- G. For assistance with reporting requirements or submission of reports, contact:
judy.ng@sfgov.org
Contract Manager, Office of Contract Management
eva.iraheta@sfgov.org
Community Services Supervisor, Welfare-to-Work Services Division

IX. Monitoring Activities

- A. Program Monitoring:
Program monitoring will include a site visit, review of quarterly and annual reports, and review of case files and back-up documentation verifying progress towards meeting service and outcome objectives. The provider should bear in mind that performance will be measured in large part by clients' success in maintaining stable housing for six months after receiving assistance.
- B. Fiscal Compliance and Grant 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 MOU's, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D	E	F
1	Appendix B-1, Page 1					
2	Document Date: 9/20/17					
3	HUMAN SERVICES AGENCY BUDGET SUMMARY					
4	BY PROGRAM					
5	Name			Term		
6	Hamilton Families			7/1/2016-6/30/20		
7	(Check One) New Renewal ___ Modification <u>X</u>					
8	If modification, Effective Date of Mod. No. of Mod. 1					
9	Program: CW Housing Locator and Connector Services					
10	Budget Reference Page No.(s)					Total
11	Program Term	7/1/16-6/30/17	7/1/17-6/30/18	7/1/18-6/30/19	7/1/19-6/30/20	7/1/2016-6/30/20
12	Expenditures					
13	Salaries & Benefits	\$477,143	\$689,577	\$477,143	\$477,143	\$2,121,006
14	Operating Expense	\$108,328	\$133,505	\$108,328	\$108,328	\$458,489
15	Subtotal	\$585,471	\$823,082	\$585,471	\$585,471	\$2,579,495
16	Indirect Percentage (%)	15%	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$87,821	\$123,462	\$87,821	\$87,821	\$386,925
18	Direct Pass-thru Expenditures	\$789,200	\$1,932,500	\$789,200	\$789,200	\$4,300,100
19	Total Expenditures	\$1,462,492	\$2,879,045	\$1,462,492	\$1,462,492	\$7,266,521
20	HSA Revenues					
21	Federal TANF 93.558	\$833,620	\$1,641,055	\$833,620	\$833,620	\$4,141,916
22	State	\$453,373	\$892,504	\$453,372	\$453,372	\$2,252,621
23	Local	\$175,499	\$345,485	\$175,499	\$175,499	\$871,982
24						
25						
26						
27						
28						
29	TOTAL HSA REVENUES	\$1,462,492	\$2,879,045	\$1,462,492	\$1,462,492	\$7,266,521
30	Other Revenues					
31						
32						
33						
34						
35						
36	Total Revenues	\$1,462,492	\$2,879,045	\$1,462,492	\$1,462,492	\$7,266,521
37	Full Time Equivalent (FTE)	7.60	10.95	10.95	10.95	
39	Prepared by: Elizabeth Hewson	Telephone No.: 415-614-9060				
40	HSA-CO Review Signature:	_____				
41	HSA #1	11/15/2007				

Program: CW Housing Locator and Connector Services
 (Same as Line 9 on HSA #1)

Salaries & Benefits Detail

11	12	Agency Totals		For HSA Program		7/1/16-6/30/17	7/1/17-6/30/18	7/1/18-6/30/19	7/1/19-6/30/20	7/1/2016-6/30/20
		Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	TOTAL Budgeted Salary
13	Program Director	\$70,000	100%	40%	40%	\$26,000	\$28,000	\$26,000	\$26,000	\$106,000
14	Case Management Coordinator	\$53,000	100%	175%	175%	\$52,000	\$92,750	\$52,000	\$52,000	\$248,750
15	Housing Resources Specialist	\$47,840	100%	100%	100%	\$47,840	\$47,840	\$47,840	\$47,840	\$191,360
16	Intake Specialist	\$43,680	100%	60%	60%	\$0	\$26,208	\$0	\$0	\$26,208
17	Housing Connection Specialist	\$44,200	100%	150%	100%	\$88,400	\$66,300	\$88,400	\$88,400	\$331,500
18	Housing Stability Specialist	\$44,200	100%	450%	500%	\$88,400	\$198,900	\$88,400	\$88,400	\$464,100
19	Program Assistant	\$41,600	100%	100%	100%	\$41,600	\$41,600	\$41,600	\$41,600	\$166,400
20	Staff Accountant	\$46,000	100%	20%	20%	\$9,200	\$9,200	\$9,200	\$9,200	\$36,800
21										
22										
23										
24										
25										
26										
27										
28										
29										
30	TOTALS		8.00	10.95	10.95	\$353,440	\$510,798	\$353,440	\$353,440	\$1,571,118
31										
32	FRINGE BENEFIT RATE	35%								
33	EMPLOYEE FRINGE BENEFITS					\$123,703	\$178,779	\$123,703	\$123,703	\$549,888
34										
35										
36	TOTAL SALARIES & BENEFITS	\$0				\$477,143	\$689,577	\$477,143	\$477,143	\$2,121,006
37	HSA #2									11/15/2007

4 Program: CW Housing Locator and Connector Services
 5 (Same as Line 9 on HSA #1)

7 **Operating Expense Detail**

11						TOTAL	
12	Expenditure Category	TERM	7/1/16-6/30/17	7/1/17-6/30/18	7/1/18-6/30/19	7/1/2016-6/30/20	7/1/2016-6/30/20
13	Rental of Property		\$45,600	\$44,000	\$45,600	\$45,600	\$180,800
14	Utilities(Elec, Water, Gas, Phone, Scavenger)		\$4,560	\$10,945	\$4,560	\$4,560	\$24,625
15	Office Supplies, Postage		\$3,610	\$6,600	\$3,610	\$3,610	\$17,430
16	Building Maintenance Supplies and Repair		\$1,140	\$1,045	\$1,140	\$1,140	\$4,465
17	Printing and Reproduction						
18	Insurance		\$5,320	\$7,810	\$5,320	\$5,320	\$23,770
19	Staff Training		\$5,472	\$11,000	\$5,472	\$5,472	\$27,416
20	Staff Travel-(Local & Out of Town)		\$9,500	\$18,000	\$9,500	\$9,500	\$46,500
21	Rental of Equipment		\$2,926	\$4,620	\$2,926	\$2,926	\$13,398
22	CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE						
23							
24							
25							
26	OTHER						
27	Computer Services		\$19,000	\$15,400	\$19,000	\$19,000	\$72,400
28	Hiring Expenses		\$760	\$1,650	\$760	\$760	\$3,930
29	Fees and Subscriptions		\$3,800	\$3,850	\$3,800	\$3,800	\$15,250
30	Payroll Services		\$3,040	\$2,585	\$3,040	\$3,040	\$11,705
31	Participant Activities		\$3,600	\$6,000	\$3,600	\$3,600	\$16,800
32							
33							
34							
35							
36							
37							
38							
39							
40							
41	TOTAL OPERATING EXPENSE		\$108,328	\$133,505	\$108,328	\$108,328	\$458,489
42							
43	HSA #3						11/15/2007

	A	B	C	D	E	F	G
1							Appendix B-1, Page 4
2							Document Date: 9/20/17
3							
4		Program Name:					
5		(Same as Line 9 on HSA #1)					
6							
7							
8							
9							TOTAL
10	PASS THRU	TERM	7/1/16-6/30/17	7/1/17-6/30/18	7/1/18-6/30/19	7/1/19-6/30/20	7/1/2016-6/30/20
11	No.	ITEM/DESCRIPTION					
12		Housing Barriers	\$10,400	\$17,500	\$10,400	\$10,400	\$48,700
13		Emergency Supplies and Assistance		\$10,000			\$10,000
14		Eviction Prevention		\$12,000			\$12,000
15		Household Goods	\$30,000	\$105,000	\$30,000	\$30,000	\$195,000
16		Rental Move-In Assistance	\$48,000	\$210,000	\$48,000	\$48,000	\$354,000
17		Rental Subsidies	\$700,800	\$1,560,000	\$700,800	\$700,800	\$3,662,400
18		Landlord Mediation Fund		\$18,000			\$18,000
19							
20	TOTAL PASS-THRU COST		\$789,200	\$1,932,500	\$789,200	\$789,200	\$3,510,900
21							
22	R E M O D E L I N G						
23	Description:						
24							
25							
26							
27							
28							
29	TOTAL REMODELING COST						
30							
31	TOTAL CAPITAL EXPENDITURE		\$789,200	\$1,932,500	\$789,200	\$789,200	\$3,510,900
32	(Equipment and Remodeling Cost)						
33	HSA #4						11/15/2007