



**MEMORANDUM**

**TO:** HUMAN SERVICES COMMISSION

**THROUGH:** TRENT RHORER, EXECUTIVE DIRECTOR

**FROM:** NOELLE SIMMONS, DEPUTY DIRECTOR  
JOHN TSUTAKAWA, DIRECTOR OF CONTRACTS *(JS)*

**DATE:** JUNE 21, 2019

**SUBJECT:** NEW GRANT: **HAMILTON FAMILIES** (NON-PROFIT) FOR PROVISION OF CALWORKS HOUSING LOCATOR, HOUSING CONNECTOR, AND CASE MANAGEMENT SERVICES

**GRANT TERM:** 7/1/2019 – 6/30/2020

**GRANT AMOUNT:**

<u>Grant</u>	<u>Contingency</u>	<u>Total</u>
\$3,686,000	\$368,600	\$4,054,600

**ANNUAL AMOUNT:** FY19-20  
\$3,686,000

**Funding Source**

<u>FUNDING:</u>	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
	\$479,180	\$1,105,800	\$2,101,020	\$368,600	\$4,054,600
<b>PERCENTAGE:</b>	13%	30%	57%		

The Department of Human Services (DHS) requests authorization to enter into a new grant agreement with Hamilton Families for the provision of housing locator, housing connector, and case management services to CalWORKs participants for the period of July 1, 2019 to June 30, 2020 in an amount of \$3,686,000 plus a 10% contingency for a total amount not to exceed \$4,054,600. The purpose of this grant is 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.

**Background**

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. Senate Bill (SB) 855 (Chapter 29, Statutes of 2014) allocated State funding for housing supports to homeless CalWORKs recipients.

392 CalWORKs families have been placed in permanent housing through the CalWORKs Housing Support Program to-date. Hamilton Family Center provides placement of new families into permanent housing and also provides the ongoing case management for Out-of-County housing placements, managing the rental subsidies and supportive services.

### **Services to be Provided**

Grantee will 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 and beyond).

#### *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. In addition to these services, the modification will support expanded case management services for all program clients as well as 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.

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

This grant will provide for placement of 110 families into housing for the 2019-20 fiscal year while continuing to provide housing support including landlord mediation, as needed, for those already housed.

### **Selection**

Grantee was selected through Request for Proposals #812 for Housing Locator, Housing Connector, and Case Management Services for CalWORKs Families issued on October 31, 2018.

### **Funding**

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

### **ATTACHMENTS**

Appendix A, Services to be Provided

Appendix B, Program Budget

**APPENDIX A – Services to be Provided**  
**Hamilton Families**  
**CalWORKs Housing Locator, Housing Connector, and Housing Stabilization**  
**July 1, 2019 – June 30, 2020**

**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.
CARBON	Contracts Administration, Reporting and Billing Online database
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"><li>1) Lacking a fixed and regular nighttime residence; or</li><li>2) Having a primary nighttime residence that is a supervised publicly or privately operated shelter designed to provide temporary living accommodations; or</li><li>3) Residing in a public or private place not designed for, or ordinarily used as, a regular sleeping accommodation for human beings; or</li><li>4) In receipt of a judgment for eviction, as ordered by a court.</li></ol>
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**

- A. Contractor will provide a list of units with descriptions for every 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 including but not limited to: Alameda, Contra Costa, Marin, Napa, San Mateo, Santa Clara, and Solano.
- B. 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, and that have monthly rent amounts which a family could conceivably assume without the help of a subsidy after exiting the Housing Support Program.
- C. Target housing search to neighborhoods where clients have a higher likelihood economic success and housing stability.
- D. 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.
- E. After the housing placement and follow-up and retention service period, the Housing Services Locator may need to be involved again with the families if there are problems with ongoing housing retention that may include arbitrating conflicts with the landlord. This service must be provided to all HSP families, regardless of whether case management is provided by SFHSA or by the contracted provider.
- F. Provider will communicate frequently with the CalWORKs program and Housing Connector 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.
- G. Provide language capacity for service mirroring the needs of the CalWORKs population.

**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. NOTE: The referral process of families from CW SW to HF is done via Launchpad, and office space for HF could be made available at the CalWORKs site to improve coordination and streamline this process.
- B. Negotiates leases with landlords pertaining to families to be placed in their rental properties. Note: the lease needs to be a year in length and signed prior to move-in and sent to the CWHSP within 5 days of completion.
- 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. Note: this report should include documentation and photos to identify any pending repairs to be provided to CalWORKs SW prior to the move-in date.

- 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. Transports families and shows available units determined to be a match.
- 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 CWHSP guidelines.
- H. Serves as the direct landlord liaison and communicates with the CalWORKs Social Workers.
- I. Coordinates housing search process and provide responsive 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 to get the lease completed, providing a unit move-in to-do list to the families, and completing the move-in checklist requirements for CalWORKs program documentation. Provides weekly progress report to the CalWORKs Social Worker on the status of families in the matching and placement process.
- J. 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 the ongoing subsidy payments.
- K. Contractor will communicate frequently with the CalWORKs program and Housing Stabilization provider 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.
- L. Contractor will provide Neighborhood Welcome packets including information on local community services and resources and distribute the packet to families once placed.
- M. Provide language capacity for service mirroring the needs of the CalWORKs population.

Housing Stabilization and Case Management Services for HSP families case managed by Hamilton Families:

- A. Provide wrap-around ongoing and intensive housing case management until the family exits the CalWORKs Housing Support Program. Case management services to include:
  - 1. At least monthly face-to-face meetings with the family and its head of household upon assuming case management or following housing placement. Case management approach with the family needs to be responsive, supportive and collaborative. Other meetings in addition to the monthly face-to-face could either be in-office, via phone/web, or home visits depending upon the need.
  - 2. Provide referrals and a resource list with local social services and employment services providers in all counties where clients are placed to actively support

- client linkages to needed services and facilitate connection with local employment opportunities.
3. Establish quarterly housing goals with each family with a plan for when the subsidy ends.
  4. Check in on and support client's progress toward obtaining or maintaining employment situations and increasing income, as well as housing retention and stability
  5. On an as needed basis, case management may entail coordinating with CWHSP and San Francisco's Coordinated Entry System to connect HSP clients with deeper housing needs to the broader array of housing and homeless services available, including emergency shelter and permanent supportive housing.
- B. Provides follow-up housing placement and retention services to all placed CalWORKs families until exit from the program.
  - C. After the housing placement and follow-up and retention service period, the Housing Services Locator may need to be involved again with the families if there are problems with ongoing housing retention that may include arbitrating conflicts with the landlord. This applies to all HSP families, regardless of whether case management is provided by SFHSA or by the contracted provider.
  - D. 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.
  - E. Contractor will receive and maintain family CalWORKs eligibility documents from program participants on a monthly basis. Income reported to Hamilton Case Manager must be verified.
  - F. Verify client's ongoing CalWORKs eligibility monthly and notify CW SW if discontinued. Determine if client will continue receiving retention services under CW WtW and for how long. Families no longer active in CalWORKs or not receiving retention services will become ineligible for HSP.
  - G. If applicable, verify program participants' ongoing CW WtW Retention Services in counties outside of San Francisco on a monthly basis.
  - H. Provide language capacity for service mirroring the needs of the CalWORKs population.

Department Responsibilities:

- A. CalWORKs Social Worker staff will work closely together with HF staff on matching and housing placement and stability. All program participants will have access to a full array of wrap-around services through their CalWORKs Housing Social Worker. When an HSP client is re-housed outside of San Francisco, the CalWORKs SW will ensure a "warm handoff" to the CalWORKs program in the new county of residence.
- 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 Services**

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 FY19/20, HF will serve 110 families at any given time.
- C. Families referred by HSA will move to Housing Connector Services within 7 days from the date referred to HF by the CW HSP unit.

**VII. Outcome Objectives**

The Grantee will meet the following Outcome Objectives:

- A. Place 110 families in housing in FY19/20, 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 placed.
- 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. This survey will be conducted by Grantee staff according to HSA guidelines. 75% of respondents will report that Grantee services helped them move towards housing stability, Grantee staff was responsive to their concerns, and assisted in connecting them to services in their new county of residence.
- G. CalWORKs Social Work and Employment Specialist staff shall complete a Client Satisfaction Survey. 80% of CalWORKs staff taking the HSA Staff Satisfaction Survey report the program supported their families in achieving housing stability.

**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 and employment status with hiring date and employer information. 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 10<sup>th</sup> 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:  
David Flores, Jr., MPA at david.flores@sfgov.org  
Principal Administrative Analyst, Office of Contract Management  
- or -  
Eva Iraheta at 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	C	D
1	Appendix B, Page 1 Document Date: 6/5/19		
2			
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>		
4	<b>BY PROGRAM</b>		
5	Agency Name:		
6	Hamilton Families		
7	(Check One)    New <input checked="" type="checkbox"/> Renewal    Modification		
8	If modification, Effective Date of Mod:		No. of Mod:
9	Program Name: CalWORKs HSP Housing Locator & Connector		
10	Budget Reference Page No.(s)		
11	Program Term:	07/01/19-06/30/20	Total
12	<b>Expenditures</b>		
13	Salaries & Benefits	\$900,894	\$900,894
14	Operating Expense	\$142,584	\$142,584
15	<b>Subtotal</b>	<b>\$1,043,478</b>	<b>\$1,043,478</b>
16	Indirect Percentage (%)	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$156,522	\$156,522
18	Direct Client Pass-through	\$2,486,000	\$2,486,000
19	Capital Expenditure		
20	<b>Total Expenditures</b>	<b>\$3,686,000</b>	<b>\$3,686,000</b>
21	<b>HSA Revenues</b>		
22	General Fund	\$479,180	\$479,180
23	Federal	\$1,105,800	\$1,105,800
24	State	\$2,101,020	\$2,101,020
25			
26			
27			
28			
29			
30	<b>TOTAL HSA REVENUES</b>	<b>\$3,686,000</b>	<b>\$3,686,000</b>
31	<b>Other Revenues</b>		
32			
33			
34			
35			
36			
37	Total Other Revenues		
38	Full Time Equivalent (FTE)	13.60	13.60
40	Prepared by: Rosa M. Martinez	Telephone: (415)321-26	Date: 05/09/2019
41	HSA-CO Review Signature:	_____	
42	HSA #1		

Program Name: CalWORKs HSP Housing Locator & Connector  
 (Same as Line 9 on HSA #1)

**Salaries & Benefits Detail**

07/01/19-06/30/20

11	12	Agency Totals		HSA Program		DHS Program	TOTAL
		Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	
13	Director of Housing Solutions	\$90,000	1.00	100%	0.25	\$22,500	\$22,500
14	Assistant Director-Housing Stability	\$75,000	1.00	100%	0.40	\$30,000	\$30,000
15	Intake Specialist	\$47,840	2.00	100%	2.00	\$95,680	\$95,680
16	Housing Navigation Specialist	\$45,760	2.00	100%	1.75	\$80,080	\$80,080
17	Housing Stability Specialist	\$45,760	6.00	100%	5.00	\$228,800	\$228,800
18	Real Estate Specialist	\$47,840	2.00	100%	1.50	\$71,760	\$71,760
19	Intake & Assessment Coordinator/Stability Coordinator	\$54,000	2.00	100%	2.00	\$108,000	\$108,000
20	Administrative Assistant	\$47,840	1.00	25%	0.50	\$23,920	\$23,920
21	Staff Accountant	\$57,845	1.00	20%	0.20	\$11,569	\$11,569
22							
23							
24							
25							
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27							
28							
29							
30							
31							
32							
33	TOTALS	511885	18.00	745%	13.60	\$672,309	\$672,309
34							
35	FRINGE BENEFIT RATE	34%					
36	EMPLOYEE FRINGE BENEFITS					\$228,585	\$228,585
37							
38							
39	TOTAL SALARIES & BENEFITS	\$511,885				\$900,894	\$900,894
40	HSA #2						

	A	B	C	D	F	G	H	I	J
1									
2									
3									
4	Program Name: CalWORKs HSP Housing Locator & Connector								
5	(Same as Line 9 on HSA #1)								
6									
7	<b>Operating Expense Detail</b>								
8									
9									
10									
11									TOTAL
12	<u>EXPENDITURE CATEGORY</u>			TERM		07/01/19-06/30/20			
13	Rental of Property					\$76,830			\$76,830
14	Utilities (Elec, Water, Gas, Phone, Garbage)					\$817			\$817
15	Office Supplies, Postage					\$3,122			\$3,122
16	Building Maintenance Supplies and Repair					\$1,124			\$1,124
17	Printing and Reproduction								
18	Insurance					\$6,244			\$6,244
19	Staff Training					\$4,683			\$4,683
20	Staff Travel (Local & Out of Town)					\$1,513			\$1,513
21	Rental of Equipment					\$3,590			\$3,590
22	<u>CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE</u>								
23									
24									
25									
26									
27									
28	<u>OTHER</u>								
29	Computer Supplies & Services					\$24,296			\$24,296
30	Fees and Subscriptions					\$781			\$781
31	Payroll Services					\$3,746			\$3,746
32	Hiring Expenses					\$3,200			\$3,200
33	Participants Activities					\$2,500			\$2,500
34	Conferences and Seminars					\$2,888			\$2,888
35	Transportation & Vehicle maintenance					\$7,250			\$7,250
36	Janitorial Services								
37	<b>Subtotal Operational Expenses</b>					<b>\$142,584</b>			<b>\$142,584</b>
38									
39	<u>DIRECT CLIENT PASS-THROUGH</u>								
40	Eviction Prevention					\$4,000			\$4,000
41	Move-in Assistance					\$275,000			\$275,000
42	Household Goods					\$165,000			\$165,000
43	Housing Barriers					\$27,500			\$27,500
44	Landlord Mediation					\$13,000			\$13,000
45	Participant Stability Financial Assistance					\$5,000			\$5,000
46	Subsidies					\$1,996,500			\$1,996,500
47	<b>Subtotal Direct Client Pass-through</b>					<b>\$2,486,000</b>			<b>\$2,486,000</b>
48									
49	<b>TOTAL OPERATING EXPENSE</b>					<b>\$2,628,584</b>			<b>\$2,628,584</b>
50									
51	HSA #3								Date: 05/09/2019