



**SAN FRANCISCO
HUMAN SERVICES AGENCY**

MEMORANDUM

Department of Benefits
and Family Support

Department of Disability
and Aging Services

P.O. Box 7988
San Francisco, CA
94120-7988
www.SFHSA.org

TO: DISABILITY AND AGING SERVICES COMMISSION

THROUGH: KELLY DEARMAN, EXECUTIVE DIRECTOR

FROM: CINDY KAUFFMAN, DEPUTY DIRECTOR
ESPERANZA ZAPIEN, DIRECTOR OF CONTRACTS

DATE: JUNE 5, 2024

SUBJECT: NEW GRANTS: **MULTIPLE GRANTEES (NON-PROFIT) TO PROVIDE HOUSING SUBSIDIES TO SENIORS AND ADULTS WITH DISABILITIES** (see table on page 2)

DS
EL

GRANT TERM: 7/1/2024-6/30/2028

GRANT AMOUNT:	<u>New</u>	<u>Contingency</u>	<u>Total</u>
	\$19,012,834	\$1,901,283	\$20,914,117

ANNUAL AMOUNT	<u>FY 24/25</u>	<u>FY 25/26</u>	<u>FY 26/27</u>	<u>FY 27/28</u>
	\$4,578,965	\$4,716,334	\$4,810,661	\$4,906,874



London Breed
Mayor

Funding Source	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
FUNDING:	\$19,012,834			\$1,901,283	\$20,914,117
PERCENTAGE:	100%				100%

Trent The Department of Disability and Aging Services (DAS) requests authorization to enter into grants with multiple providers for the period of July 1, 2024 to June 30, 2028, in an amount of \$19,012,834, plus a 10% contingency for a total amount not to exceed \$20,914,117. The purpose of these grants is to provide housing subsidies to older adults and adults with disabilities in order to assist them in stabilizing their housing.

Grantee	FY24/25	FY25/26	FY26/27	FY27/28	Total	10% Contingency	Not to exceed
Catholic Charities	\$1,077,170	\$1,109,485	\$1,131,675	\$1,154,308	\$4,472,638	\$447,264	\$4,919,902
Eviction Defense Collaborative Inc.	\$2,422,129	\$2,494,793	\$2,544,689	\$2,595,583	\$10,057,194	\$1,005,719	\$11,062,913*
Self-Help for the Elderly	\$1,079,666	\$1,112,056	\$1,134,297	\$1,156,983	\$4,483,002	\$448,300	\$4,931,302
Total	\$4,578,965	\$4,716,334	\$4,810,661	\$4,906,874	\$19,012,834	\$1,901,283	\$20,914,117

* Requires Board of Supervisors approval.

Background

The challenge of maintaining safe, affordable housing disproportionately affects older adults and adults with disabilities. San Francisco housing costs are among the highest in the United States. At the same time, the median monthly income for older adults and adults with disabilities is well below the area median income. The supply of safe, affordable housing in San Francisco is also well below what is needed.

This program seeks to address this disparity by identifying older adults and adults with disabilities who are facing imminent housing jeopardy and help stabilize their housing situation through housing subsidies. Program consumers receive monthly subsidy payments towards their rent to help lower their rent burden. Housing subsidies play a crucial role in helping consumers afford housing, prevent homelessness, improve living conditions, and support overall economic and social stability.

Services to be Provided

All DAS housing subsidy program grantees will include the following service components in their programs.

1. **Program Infrastructure**
Grantees will have policies and procedures regarding accounting procedures, payment process, and other administrative duties. Grantees will also have a secure record keeping system to keep consumers' data and track the history of housing subsidy dollars spent, case planning, and case management.
2. **Consumer Identification and Eligibility**
Each program participant will go through an application, eligibility determination, and award process. Grantees will have clear policies for these steps.

3. Housing Subsidy Payments

The program includes detailed guidelines for subsidy amount determination, amount limits, and housing situation evaluation. Grantees will ensure that all housing subsidies provided are reasonable and properly procured.

4. Housing Subsidy Recertification

Consumers will be recertified at least once annually to reassess eligibility and housing situation. The subsidy may be renewed if a consumer is engaged in their service plan and continues to meet program eligibility requirements.

5. Case Planning

Grantees will engage consumers in case planning designed to further stabilize their housing or connect them to financial, legal, social, medical, and other resources as needed.

Selection

Grantees were selected through Request for Proposals 1108, which was competitively bid on January 12, 2024.

Funding

Funding for these grants is provided by County General Funds.

ATTACHMENTS

Catholic Charities

Appendix A: Services to be provided

Appendix B: Program budget

Eviction Defense Collaborative Inc.

Appendix A: Services to be provided

Appendix B: Program budget

Self-Help for the Elderly

Appendix A: Services to be provided

Appendix B: Program budget

**APPENDIX A - SERVICES TO BE PROVIDED BY
CATHOLIC CHARITIES
HOUSING SUBSIDIES**

Effective July 1, 2024 through June 30, 2028

I. Purpose of Grant

Older adults and adults with disabilities face an ongoing struggle to maintain stable housing in San Francisco due to increasing rents and a limited supply of safe, affordable housing. This grant prevents homelessness and promotes housing stabilization by providing housing subsidies for older adults and adults with disabilities in unstable housing situations.

II. Definitions

Adult with a Disability	A person 18 to 59 years of age living with a disability
AMI	Area Median Income for the area containing San Francisco is a figure established by the United States Department of Housing and Urban Development on an annual basis. The City of San Francisco publishes an AMI chart each year which can be located here: https://www.sf.gov/find-your-area-median-income-ami-level
At Risk of Institutionalization	To be considered at risk of institutionalization, a person must have, at a minimum, one of the following: 1) functional impairment in a minimum of two Activities of Daily Living (ADL): eating, dressing, transferring, bathing, toileting, and grooming; or 2) a medical condition to the extent requiring the level of care that would be provided in a nursing facility; or 3) be unable to manage his/her own affairs due to emotional and/or cognitive impairment, evidenced by functional impairment in a minimum of three Instrumental Activities of Daily Living (IADLs): preparing meals, managing money, shopping for groceries or personal items, performing housework, using a telephone.
CARBON	Contracts Administration, Reporting and Billing Online System.
City	City and County of San Francisco
Communities of Color	An inclusive term and unifying term for persons who do not identify as White, who have been historically and systemically disadvantaged by institutionalized and interpersonal racism
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
Grantee	Catholic Charities

HUD	Department of Housing and Urban Development
LGBTQ+	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their sex assigned at birth. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender nonbinary.
Limited English-speaking Proficiency	Any person who does not speak English well or is otherwise unable to communicate effectively in English because English is not the person's primary language
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
OCM	Office of Contract Management, Human Services Agency
OCP	Office of Community Partnerships
Older Adult	Person who is 60 years of age or older
Senior	Person who is 60 years of age or older; used interchangeably with "older adult".
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
SFHSA	San Francisco Human Services Agency
Socially Isolated	Having few social relationships and few people to interact with regularly
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and grantees that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the consumers they serve (Chapter 104, Sections 104.1 through 104.9.)

III. Target Population

This program is designed to serve all ethnicities and populations, with focused expertise to promote the unique cultural needs which have been identified as demonstrating the greatest economic and social need:

1. Persons with low income
2. Persons who are socially isolated
3. Persons with limited English-speaking proficiency
4. Persons from communities of color
5. Persons who identify as LGBTQ+
6. Persons at risk of institutionalization

IV. Eligibility for Services

To obtain housing subsidy services, an individual must meet the following criteria:

1. Aged 60 and above, or
2. Aged 18 to 59 with a disability, and
3. At an income level of 50% of AMI or below, and
4. Lacking stable housing and at risk for eviction and homelessness, and
5. A resident of San Francisco

V. Location and Time of Services

Catholic Charities' housing subsidy services will be administered at 990 Eddy Street in San Francisco. The program will be open Monday through Friday from 8:30 am to 5:00 pm.

VI. Description of Services

The housing subsidy services shall include the following five components: program infrastructure, consumer identification and eligibility, housing subsidy payments, housing subsidy recertification, and case planning.

1. Program Infrastructure:

- a. Program policies and procedures shall include all accounting procedures and reporting functions needed to administer the Housing Subsidy Program.
- b. Grantee shall be able to provide administrative assistance, data entry, database maintenance, processing of invoices, payments to landlords, creation of purchase service contracts, and payment policies.
- c. Grantee shall have a dedicated database or contemporary record keeping process to capture case planning, case management, consumer information tracking, purchased services, and dollars spent for consumers on housing subsidies.

2. Consumer Identification and Eligibility:

- a. The program shall have policies and procedures clearly defining eligibility criteria as well as the processes of application, decision, award, and recertification.
- b. The program shall have clear policies and procedures for waitlists and other program functions as needed.

3. Housing Subsidy Payments:

- a. The program shall have policies and procedures describing all aspects of housing subsidy determination, maximums and/or minimum subsidy amounts, urgent subsidy situations, etc.
- b. Rental subsidies for consumers can be set up to \$1,000 per household per month. The subsidy shall be set at the lowest possible amount needed to stabilize the housing.
- c. The subsidy amount is determined by each household's rent to income ratio. The goal will be to use the housing subsidy to bring the household rent to income ratio to 30%. In the cases where a \$1,000 monthly subsidy is insufficient to reach the 30% rent to income ratio, the subsidy amount can be used to pay up to 50% of the consumer's income towards the rent. Essential medical payments (insurance, prescriptions, medical bills) can be deducted from the household income for subsidy calculation.
- d. In limited cases, when a subsidy of \$1,000 is insufficient to reduce the rent to income ratio to 50%, it may be increased up to and not to exceed \$1,200 per month. For consumers receiving a subsidy above \$1,000, their eligibility and needs for the increased subsidy shall be clearly documented, as well as a plan to reduce the future subsidy to \$1,000 or less. During the periods when the monthly subsidy is above \$1,000, consumers shall undergo recertification every 6 months.

- e. Additional eligible payments under this program include back rent. Consumers who enroll into the program with back rent needs, may have up to 3 months of back rent paid, one time only, with the amount to be verified by the lease agreement and/or written communication with the landlord. Additional payments under this section shall be capped at \$5,000 total across all uses.
- f. Rent limits for consumers shall conform to HUD Fair Market Rents (FMR) for San Francisco Metro Area.
- g. Grantee must clearly demonstrate linkages to existing resources for income and other resources.
- h. Grantee will work to ensure sub-standard housing issues are addressed. When evaluating housing situation, an apartment inspection checklist will be utilized to ensure that units meet minimum safety guidelines. If consumers are living in sub-standard housing, subsidies can be used to pay rent on a new unit.
- i. Grantee will ensure that all housing subsidies paid for program consumers are reasonable, prudent, and properly procured.

4. Housing Subsidy Recertification:

- a. Grantee shall have policies and procedures regarding the process of recertification.
- b. Subsidies must be recertified at least once annually, and more frequently if there are concerns about the household's non-compliance, lack of progress, or if sub-standard housing or safety issues are present. Consumers with short-term needs shall be recertified at more frequent intervals to ensure continued eligibility.
- c. Subsidies shall be need-based as opposed to time-limited. The subsidy may be renewed if consumers are engaged in their identified plan and continue to meet program eligibility requirements.

5. Case Planning:

- a. Grantee shall have policies and procedures outlining the provision of case planning. Program consumers must participate in a case plan designed to stabilize their housing.
- b. Case plan goals may include but are not limited to:
 - i. Actions to increase income and access to other available resources which help lower overall household expenses.
 - ii. Actions to improve credit history and rental stability.
 - iii. Efforts to address behavioral health issues that negatively impact housing stability.
 - iv. Efforts to access more affordable housing, including applying to appropriate waitlists.
- c. Grantee shall be familiar with other community resources and assist consumers in connecting with other resources as needed. Grantee shall work collaboratively with other organizations that are working with the consumer in order to resolve housing issues if applicable.

Grantee may enhance the subsidy model described with additional components that will be effective in achieving successful outcomes.

VII. Service Objectives

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

1. Grantee will provide housing subsidies for at least **120** unduplicated consumers.
2. Grantee will provide at least **1,100** months of housing subsidies. One unit of service is one monthly subsidy payment.
3. Grantee will transition at least **10** unduplicated consumers off the Housing Subsidy Program.

VIII. Outcome Objectives

Outcome objectives will be measured through analysis of program data reported, plus the administration of an annual client survey by Grantee. Actual survey question structure and survey administration shall be approved by DAS/OCP staff in advance of survey release. Survey completion rate shall be 65% of total program consumers during the fiscal year.

1. Housing Retention Outcomes
 - a. At least **85%** of consumers are stably housed for 6 months after subsidies began.
 - b. At least **75%** of consumers remain stably housed for 12 months after subsidies began.
2. Consumer Satisfaction Outcomes
 - a. At least **75%** of consumers indicate that they were treated in a respectful and professional manner by program staff.
 - b. At least **75%** of consumers who received housing subsidies report that the subsidies have helped them keep stable housing.

IX. Reporting Requirements

Grantee will provide various reports during the term of the grant agreement:

1. Grantee shall enter consumers' data into the SF DAS GetCare database system as required by DAS analyst staff. This shall include SOGI data.
2. Grantee shall enter all the units of service into the SF GetCare Service by the 5th working day of the month for the preceding month.
3. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS/OCP and OCM staff.
4. Grantee program staff shall complete the California Department of Aging (CDA) Security Awareness training and SF DAS Elder Abuse Prevention and Mandated Reporter Training on an annual basis. Grantee shall maintain the evidence of staff completion of the training.
5. Grantee shall submit response rates and aggregated data from the annual consumer satisfaction survey to OCP staff by March 15th of each grant year.

6. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 of each grant year.
7. Grantee shall develop and deliver ad hoc reports as requested by DAS/OCP.
8. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
9. Apart from reports to be sent via email to the Program Analyst and/or Contract Manager, all other reports and communications shall be sent to the following addresses:

Tahir Shaikh
Senior Contracts Manager/RSA
P.O. Box 7988
San Francisco, CA 94120
Tahir.shaikh@sfgov.org

Zhiqing Li
DAS, Office of Community Partnerships
P.O. Box 7988
San Francisco, CA 94120
Zhiqing.li@sfgov.org

X. Monitoring Activities

1. Program Monitoring: Program monitoring will include review of compliance with specific program standards or requirements, documentation of consumer eligibility and targeted mandates, records of the units of services and all reports, progress of service and outcome objectives, consumer records' collection and maintenance, reporting performance including monthly service unit reports on SF DAS Getcare, current organizational chart, evidence of program staff's training on Elder Abuse Reporting and California Department of Aging (CDA) Security Awareness Training, written policies and procedures manuals of all DAS/OCP funded programs, written project income policies if applicable, grievance procedure posted onsite and provided for the homebound consumers, site chart with updated hours of operation, a list of board of directors with age and ethnicity information, and outcomes of service provision according to Sections VI, VII, and VIII.
2. 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, and HIPAA compliance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Agency Name: Catholic Charities				Grant Term: 7/1/24 - 6/30/28	
(Check One) New		Renewal	Modification	Internal Revision	
If modification, Effective Date:			Modification No.:		
Program Name: Housing Subsidies					
	FY 24/25	FY 25/26	FY 26/27	FY 27/28	Total
	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/27 - 6/30/28	7/1/24 - 6/30/28
Expenditures					
Salaries & Benefits	\$331,400	\$341,343	\$351,583	\$362,131	\$1,386,457
Operating Expenses	\$14,655	\$15,285	\$15,942	\$16,633	\$62,515
Subtotal	\$346,055	\$356,628	\$367,525	\$378,764	\$1,448,972
Indirect Percentage (%)	15.00%	15.00%	15.00%	15.00%	15.00%
Indirect Costs (Line 16 X Line 15)	\$51,908	\$53,494	\$55,131	\$56,812	\$217,345
CODB Eligible Expenses	\$397,963	\$410,122	\$422,656	\$435,576	\$1,666,317
Consultant/Subcontractor (\$25,000+)					\$0
Direct Client Pass-Through (subsidies)	\$679,207	\$699,363	\$709,019	\$718,732	\$2,806,321
Capital Expenses/Subcontractor					\$0
Total Expenses	\$1,077,170	\$1,109,485	\$1,131,675	\$1,154,308	\$4,472,638
HSA Revenues					
General Fund	\$1,045,796	\$1,045,796	\$1,045,796	\$1,045,796	\$4,183,184
FY24/25 CODB	\$31,374	\$31,374	\$31,374	\$31,374	\$125,496
FY25/26 CODB		\$32,315	\$32,315	\$32,315	\$96,945
FY26/27 CODB			\$22,190	\$22,190	\$44,379
FY27/28 CODB				\$22,633	\$22,633
Total HSA Revenues	\$1,077,170	\$1,109,485	\$1,131,675	\$1,154,308	\$4,472,638
Other Program Revenues					
In-Kind Match					
Total Other Program Revenues	\$0	\$0	\$0	\$0	\$0
Total DAS and NON DAS Revenues	\$1,077,170	\$1,109,485	\$1,131,675	\$1,154,308	\$4,472,638
Prepared by: Leny Nair		Telephone No.: 415-677-7682		Date: 4/12/2024	
<i>HSA Budget Form (2/22/24)</i>					

Agency Name: Catholic Charities
Program Name: Housing Subsidies

Salaries & Benefits Detail

POSITION TITLE	Agency Totals		HSA Program		FY 24/25	FY 25/26	FY 26/27	FY 27/28	Total
	Annual Full	Total	% FTE	Adjusted	7/1/24-6/30/25	7/1/25-6/30/26	7/1/26-6/30/27	7/1/27-6/30/28	7/1/24 - 6/30/28
Associate Deputy Director	\$165,764	20%	50%	0.10	\$16,576	\$17,073	\$17,585	\$18,113	\$69,347
Assistant Deputy Director	\$113,568	50%	60%	0.30	\$34,070	\$35,092	\$36,145	\$37,229	\$142,536
Housing Case Manager	\$64,288	100%	100%	1.00	\$64,288	\$66,217	\$68,204	\$70,250	\$268,958
Housing Case Manager	\$60,585	100%	100%	1.00	\$60,585	\$62,403	\$64,275	\$66,203	\$253,466
Housing Case Manager	\$60,585	100%	100%	1.00	\$60,585	\$62,403	\$64,275	\$66,203	\$253,466
Program Specialist	\$81,883	57%	28%	0.16	\$13,069	\$13,461	\$13,865	\$14,281	\$54,676
TOTALS	\$ 546,673	4.27	438%	3.56	\$249,173	\$256,649	\$264,348	\$272,279	\$1,042,449
FRINGE BENEFIT RATE	33%								
EMPLOYEE FRINGE BENEFITS					\$82,227	\$84,694	\$87,235	\$89,852	\$344,008
TOTAL SALARIES & BENEFITS					\$331,400	\$341,343	\$351,583	\$362,131	\$1,386,457

Agency Name: Catholic Charities
Program Name: Housing Subsidies

Operating Expenses Detail

Expenditure Category					Total
	FY 24/25	FY 25/26	FY 26/27	FY 27/28	FY 24/28
	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/27 - 6/30/28	7/1/24 - 6/30/28
Rental of Property	\$ 4,047	\$ 4,249	\$ 4,462	\$ 4,685	\$ 17,443
Utilities(Elec, Water, Gas, Phone, Garbage)	\$1,400	\$ 1,442	\$ 1,485	\$ 1,530	\$ 5,857
Office Supplies, Postage	\$450	\$ 464	\$ 477	\$ 492	\$ 1,883
Building Maintenance Supplies and Repair	\$800	\$ 824	\$ 849	\$ 874	\$ 3,347
Printing and Reproduction	\$200	\$ 206	\$ 212	\$ 219	\$ 837
Insurance	\$5,468	\$ 5,741	\$ 6,028	\$ 6,330	\$ 23,568
Licenses/Fee	\$0	\$0	\$0	\$0	\$ -
Staff Training	\$350	\$ 361	\$ 371	\$ 382	\$ 1,464
Staff Travel-(Local & Out of Town)	\$1,000	\$ 1,030	\$ 1,061	\$ 1,093	\$ 4,184
Rental of Equipment	\$460	\$ 474	\$ 488	\$ 503	\$ 1,925
CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE					
OTHER					
Computer Related(Tech Support for troubleshooting)	\$480	\$ 494	\$ 509	\$ 525	\$ 2,008
TOTAL OPERATING EXPENSE	\$14,655	\$15,285	\$15,942	\$16,633	\$62,515

**APPENDIX A - SERVICES TO BE PROVIDED BY
EVICITION DEFENSE COLLABORATIVE
HOUSING SUBSIDIES**

Effective July 1, 2024 through June 30, 2028

I. Purpose of Grant

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City	City and County of San Francisco
Communities of Color	An inclusive term and unifying term for persons who do not identify as White, who have been historically and systemically disadvantaged by institutionalized and interpersonal racism
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
Grantee	Eviction Defense Collaborative

HUD	Department of Housing and Urban Development
LGBTQ+	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their sex assigned at birth. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender nonbinary.
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1. Persons with low income
2. Persons who are socially isolated
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4. Persons from communities of color
5. Persons who identify as LGBTQ+
6. Persons at risk of institutionalization

IV. Eligibility for Services

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1. Aged 60 and above, or
2. Aged 18 to 59 with a disability, and
3. At an income level of 50% of AMI or below, and
4. Lacking stable housing and at risk for eviction and homelessness, and
5. A resident of San Francisco

V. Location and Time of Services

Eviction Defense Collaborative's housing subsidy services are administered at 976 Mission Street in San Francisco. Service drop-in hours are Monday, Tuesday, Wednesday, and Friday, 10:00 - 11:30am and 1:00 - 2:30pm.

VI. Description of Services

The housing subsidy services shall include the following five components: program infrastructure, consumer identification and eligibility, housing subsidy payments, housing subsidy recertification, and case planning.

1. Program Infrastructure:

- a. Program policies and procedures shall include all accounting procedures and reporting functions needed to administer the housing subsidy program.
- b. Grantee shall be able to provide administrative assistance, data entry, database maintenance, processing of invoices, payments to landlords, creation of purchase service contracts, and payment policies.
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- a. The program shall have policies and procedures describing all aspects of housing subsidy determination, maximums and/or minimum subsidy amounts, urgent subsidy situations, etc.
- b. Rental subsidies for consumers can be set up to \$1,000 per household per month. The subsidy shall be set at the lowest possible amount needed to stabilize the housing.
- c. The subsidy amount is determined by each household's rent to income ratio. The goal will be to use the housing subsidy to bring the household rent to income ratio to 30%. In the cases where a \$1,000 monthly subsidy is insufficient to reach the 30% rent to income ratio, the subsidy amount can be used to pay up to 50% of the consumer's income towards the rent. Essential medical payments (insurance, prescriptions, medical bills) can be deducted from the household income for subsidy calculation.
- d. In limited cases, when a subsidy of \$1,000 is insufficient to reduce the rent to income ratio to 50%, it may be increased up to and not to exceed \$1,200 per month. For consumers receiving a subsidy above \$1,000, their eligibility and needs for the increased subsidy shall be clearly documented, as well as a plan to reduce the future subsidy to \$1,000 or less. During the

periods when the monthly subsidy is above \$1,000, consumers shall undergo recertification every 6 months.

- e. Additional eligible payments under this program include back rent. Consumers who enroll into the program with back rent needs, may have up to 3 months of back rent paid, one time only, with the amount to be verified by the lease agreement and/or written communication with the landlord. Additional payments under this section shall be capped at \$5,000 total across all uses.
- f. Rent limits for consumers shall conform to HUD Fair Market Rents (FMR) for San Francisco Metro Area.
- g. Grantee must clearly demonstrate linkages to existing resources for income and other resources.
- h. Grantee will work to ensure sub-standard housing issues are addressed. When evaluating housing situation, an apartment inspection checklist will be utilized to ensure that units meet minimum safety guidelines. If consumers are living in sub-standard housing, subsidies can be used to pay rent on a new unit.
- i. Grantee will ensure that all housing subsidies paid for program consumers are reasonable, prudent, and properly procured.

4. Housing Subsidy Recertification:

- a. Grantee shall have policies and procedures regarding the process of recertification.
- b. Subsidies must be recertified at least once annually, and more frequently if there are concerns about the household's non-compliance, lack of progress, or if sub-standard housing or safety issues are present. Consumers with short-term needs shall be recertified at more frequent intervals to ensure continued eligibility.
- c. Subsidies shall be need-based as opposed to time-limited. The subsidy may be renewed if consumers are engaged in their identified plan and continue to meet program eligibility requirements.

5. Case Planning:

- a. Grantee shall have policies and procedures outlining the provision of case planning. Program consumers must participate in a case plan designed to stabilize their housing.
- b. Case plan goals may include but are not limited to:
 - i. Actions to increase income and access to other available resources which help lower overall household expenses.
 - ii. Actions to improve credit history and rental stability.
 - iii. Efforts to address behavioral health issues that negatively impact housing stability.
 - iv. Efforts to access more affordable housing, including applying to appropriate waitlists.
- c. Grantee shall be familiar with other community resources and assist consumers in connecting with other resources as needed. Grantee shall work collaboratively with other organizations that are working with the consumer in order to resolve housing issues if applicable.

Grantee may enhance the subsidy model described with additional components that will be effective in achieving successful outcomes.

VII. Service Objectives

Grantee will meet the following service objectives:

Service Objectives	FY 24-25	FY 25-26	FY 26-27	FY 27-28
Minimum number of unduplicated consumers who will receive housing subsidies	189	196	200	204
Minimum total number of months of housing subsidies to be provided by Grantee (One unit of service is one month of subsidy payment.)	1,817	1,886	1,921	1,956
Minimum number of unduplicated consumers to be transitioned off the housing subsidy program	10	10	10	10

VIII. Outcome Objectives

Outcome objectives will be measured through analysis of program data reported, plus the administration of an annual consumer survey by Grantee. Actual survey question structure and survey administration shall be approved by DAS/OCP staff in advance of survey release. Survey completion rate shall be 65% of total program consumers during the fiscal year.

1. Housing Retention Outcomes
 - a. At least **85%** of consumers are stably housed for 6 months after subsidies began.
 - b. At least **75%** of consumers remain stably housed for 12 months after subsidies began.
2. Consumer Satisfaction Outcomes
 - a. At least **75%** of consumers indicate that they were treated in a respectful and professional manner by program staff.
 - b. At least **75%** of consumers who received housing subsidies report that the subsidies have helped them keep stable housing.

IX. Reporting Requirements

Grantee will provide various reports during the term of the grant agreement:

1. Grantee shall enter consumers' data into the SF DAS GetCare database system as required by DAS analyst staff. This shall include SOGI data.
2. Grantee shall enter all the units of service into the SF GetCare Service by the 5th working day of the month for the preceding month.
3. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS/OCP and OCM staff.

4. Grantee program staff shall complete the California Department of Aging (CDA) Security Awareness training and SF DAS Elder Abuse Prevention and Mandated Reporter Training on an annual basis. Grantee shall maintain the evidence of staff completion of the training.
5. The grantee shall submit response rates and aggregated data from the annual consumer satisfaction survey to OCP staff by March 15th of each grant year.
6. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 of each grant year.
7. Grantee shall develop and deliver ad hoc reports as requested by DAS/OCP.
8. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
9. Apart from reports to be sent via email to the Program Analyst and/or Contract Manager, all other reports and communications shall be sent to the following addresses:

Tahir Shaikh
Senior Contracts Manager/RSA
P.O. Box 7988
San Francisco, CA 94120
Tahir.shaikh@sfgov.org

Zhiqing Li
DAS, Office of Community Partnerships
P.O. Box 7988
San Francisco, CA 94120
Zhiqing.li@sfgov.org

X. Monitoring Activities

1. Program Monitoring: Program monitoring will include review of compliance with specific program standards or requirements, documentation of consumer eligibility and targeted mandates, records of the units of services and all reports, progress of service and outcome objectives, consumer records' collection and maintenance, reporting performance including monthly service unit reports on SF DAS Getcare, current organizational chart, evidence of program staff's training on Elder Abuse Reporting and California Department of Aging (CDA) Security Awareness Training, written policies and procedures manuals of all DAS/OCP funded programs, written project income policies if applicable, grievance procedure posted onsite and provided for the homebound consumers, site chart with updated hours of operation, a list of board of directors with age and ethnicity information, and outcomes of service provision according to Sections VI, VII, and VIII.
2. 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, and HIPAA compliance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Agency Name: Eviction Defense Collaborative Inc.				Grant Term:	7/1/24 - 6/30/28
(Check One)	New	Renewal	Modification	Internal Revision	
If modification, Effective Date:			Modification No.:		
Program Name: Housing Subsidies					
	FY 24/25	FY 25/26	FY 26/27	FY 27/28	Total
	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/27 - 6/30/28	7/1/24 - 6/30/28
Expenditures					
Salaries & Benefits	\$435,989	\$446,889	\$458,061	\$469,513	\$1,810,451
Operating Expenses	\$108,331	\$101,336	\$103,748	\$106,312	\$419,727
Subtotal	\$544,320	\$548,225	\$561,809	\$575,824	\$2,230,178
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Costs (Line 16 X Line 15)	\$81,648	\$82,234	\$84,271	\$86,374	\$334,527
CODB Eligible Expenses	\$625,968	\$630,459	\$646,080	\$662,198	\$2,564,705
Consultant/Subcontractor (\$25,000+)	\$0	\$0	\$0	\$0	\$0
Direct Client Pass-Through (subsidies)	\$1,796,161	\$1,864,334	\$1,898,609	\$1,933,385	\$7,492,489
Capital Expenses/Subcontractor	\$0	\$0	\$0	\$0	\$0
Total Expenses	\$2,422,129	\$2,494,793	\$2,544,689	\$2,595,583	\$10,057,194
HSA Revenues					
Total HSA Revenues	\$2,422,129	\$2,494,793	\$2,544,689	\$2,595,583	\$10,057,194
Other Program Revenues					
In-Kind Match					
Total Other Program Revenues	\$0	\$0	\$0	\$0	\$0
Total DAS and NON DAS Revenues	\$2,422,129	\$2,494,793	\$2,544,689	\$2,595,583	\$10,057,194
Prepared by:	Leny Nair	Telephone No.:	415-677-7682	Date:	4/12/2024
HSA Budget Form (2/22/24)					

Agency Name: Eviction Defense Collaborative Inc.
Program Name: Housing Subsidies

Salaries & Benefits Detail

POSITION TITLE	Agency Totals		HSA Program		FY 24/25	FY 25/26	FY 26/27	FY 27/28	Total
	Annual Full	Total FTE	% FTE	Adjusted	7/1/24-6/30/25	7/1/25-6/30/26	7/1/26-6/30/27	7/1/27-6/30/28	7/1/24 - 6/30/28
DAS Housing Subsidy Supervisor	\$94,556	1.0	100%	1.00	\$94,556	\$96,920	\$99,343	\$101,827	\$392,646
DAS Housing Subsidy Coordinator	\$78,797	1.0	100%	1.00	\$78,797	\$80,767	\$82,786	\$84,856	\$327,205
DAS Housing Subsidy Coordinator	\$71,443	1.0	100%	1.00	\$71,443	\$73,229	\$75,059	\$76,936	\$296,666
DAS Housing Subsidy Coordinator	\$78,797	1.0	100%	1.00	\$78,797	\$80,767	\$82,786	\$84,856	\$327,205
RADCO Program Director	\$108,214	1.0	5%	0.05	\$5,411	\$5,546	\$5,685	\$5,827	\$22,468
Interim RADCO Program Director	\$36,259	1.0	5%	0.05	\$1,813	\$1,858	\$1,905	\$1,952	\$7,528
Data & Finance Manager	\$59,852	1.0	5%	0.05	\$2,993	\$3,067	\$3,144	\$3,223	\$12,427
RADCO Program Assistant	\$72,391	1.0	5%	0.05	\$3,620	\$3,710	\$3,803	\$3,898	\$15,030
RADCO Senior Intake Specialist	\$74,466	1.0	5%	0.05	\$3,723	\$3,816	\$3,912	\$4,010	\$15,461
RADCO Intake Specialist	\$69,341	1.0	5%	0.05	\$3,467	\$3,554	\$3,643	\$3,734	\$14,397
RADCO Intake Specialist	\$69,316	1.0	5%	0.05	\$3,466	\$3,552	\$3,641	\$3,732	\$14,392
RADCO Intake Specialist	\$70,392	1.0	5%	0.05	\$3,520	\$3,608	\$3,698	\$3,790	\$14,615
Funds Processors									
Funds Processors									
TOTALS	\$883,824	12.00	440%	4.40	\$351,604	\$360,394	\$369,404	\$378,639	\$1,460,041
FRINGE BENEFIT RATE	24%								
EMPLOYEE FRINGE BENEFITS					\$84,385	\$86,495	\$88,657	\$90,873	\$350,410
TOTAL SALARIES & BENEFITS					\$435,989	\$446,889	\$458,061	\$469,513	\$1,810,451

Agency Name: Eviction Defense Collaborative Inc.
Program Name: Housing Subsidies

Operating Expenses Detail

Expenditure Category	FY 24/25	FY 25/26	FY 26/27	FY 27/28	Total
	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/27 - 6/30/28	FY 24/28
					7/1/24 - 6/30/28
Rental of Property	\$25,031	\$26,282	\$27,596	\$28,976	\$107,886
Utilities(Elec, Water, Gas, Phone, Garbage)	\$10,592	\$10,910	\$11,237	\$11,574	\$44,313
Office Supplies, Postage	\$5,913	\$5,913	\$5,913	\$5,913	\$23,652
Building Maintenance Supplies and Repair	\$5,125	\$5,125	\$5,125	\$5,125	\$20,501
Printing and Reproduction	\$0	\$0	\$0	\$0	\$0
Insurance	\$7,000	\$7,700	\$8,470	\$9,317	\$32,487
Licenses/Fee	\$4,372	\$4,372	\$4,372	\$4,372	\$17,488
Staff Training	\$2,186	\$2,186	\$2,186	\$2,186	\$8,744
Staff Travel-(Local & Out of Town)	\$2,000	\$2,000	\$2,000	\$2,000	\$8,000
Rental of Equipment	\$548	\$548	\$548	\$548	\$2,191
CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE					\$0
OTHER					
Accounting & Audit	\$7,305	\$3,000	\$3,000	\$3,000	\$16,305
HR & Federal Grants Attorneys	\$9,588	\$5,000	\$5,000	\$5,000	\$24,588
Database & IT Costs	\$26,813	\$14,000	\$14,000	\$14,000	\$68,813
Ads & Outreach	\$685	\$14,000	\$14,000	\$14,000	\$42,685
Staff Recuriting & Language Test	\$1,174	\$300	\$300	\$300	\$2,074
					\$0
TOTAL OPERATING EXPENSE	\$108,331	\$101,336	\$103,748	\$106,312	\$419,727

**APPENDIX A - SERVICES TO BE PROVIDED BY
SELF-HELP FOR THE ELDERLY
HOUSING SUBSIDIES**

Effective July 1, 2024 through June 30, 2028

I. Purpose of Grant

Older adults and adults with disabilities face an ongoing struggle to maintain stable housing in San Francisco due to increasing rents and a limited supply of safe, affordable housing. This grant prevents homelessness and promotes housing stabilization by providing housing subsidies for older adults and adults with disabilities in unstable housing situations.

II. Definitions

Adult with a Disability	A person 18 to 59 years of age living with a disability
AMI	Area Median Income for the area containing San Francisco is a figure established by the United States Department of Housing and Urban Development on an annual basis. The City of San Francisco publishes an AMI chart each year which can be located here: https://www.sf.gov/find-your-area-median-income-ami-level
At Risk of Institutionalization	To be considered at risk of institutionalization, a person must have, at a minimum, one of the following: 1) functional impairment in a minimum of two Activities of Daily Living (ADL): eating, dressing, transferring, bathing, toileting, and grooming; or 2) a medical condition to the extent requiring the level of care that would be provided in a nursing facility; or 3) be unable to manage his/her own affairs due to emotional and/or cognitive impairment, evidenced by functional impairment in a minimum of three Instrumental Activities of Daily Living (IADLs): preparing meals, managing money, shopping for groceries or personal items, performing housework, using a telephone.
CARBON	Contracts Administration, Reporting and Billing Online System.
City	City and County of San Francisco
Communities of Color	An inclusive term and unifying term for persons who do not identify as White, who have been historically and systemically disadvantaged by institutionalized and interpersonal racism
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
Grantee	Self-Help for the Elderly

HUD	Department of Housing and Urban Development
LGBTQ+	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their sex assigned at birth. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender nonbinary.
Limited English-speaking Proficiency	Any person who does not speak English well or is otherwise unable to communicate effectively in English because English is not the person's primary language
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
OCM	Office of Contract Management, Human Services Agency
OCP	Office of Community Partnerships
Older Adult	Person who is 60 years of age or older
Senior	Person who is 60 years of age or older; used interchangeably with "older adult".
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
SFHSA	San Francisco Human Services Agency
Socially Isolated	Having few social relationships and few people to interact with regularly
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and grantees that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the consumers they serve (Chapter 104, Sections 104.1 through 104.9.)

III. Target Population

This program is designed to serve all ethnicities and populations, with focused expertise to promote the unique cultural needs which have been identified as demonstrating the greatest economic and social need:

1. Persons with low income
2. Persons who are socially isolated
3. Persons with limited English-speaking proficiency
4. Persons from communities of color
5. Persons who identify as LGBTQ+
6. Persons at risk of institutionalization

IV. Eligibility for Services

To obtain housing subsidy services, an individual must meet the following criteria:

1. Aged 60 and above, or
2. Aged 18 to 59 with a disability, and
3. At an income level of 50% of AMI or below, and
4. Lacking stable housing and at risk for eviction and homelessness, and
5. A resident of San Francisco

V. Location and Time of Services

Self-Help for the Elderly's housing subsidy services are administered at 829 Kearny Street, San Francisco. The services are available Monday through Friday from 9:00 am to 5:00 pm.

VI. Description of Services

The housing subsidy services shall include the following five components: program infrastructure, consumer identification and eligibility, housing subsidy payments, housing subsidy recertification, and case planning.

1. Program Infrastructure:

- a. Program policies and procedures shall include all accounting procedures and reporting functions needed to administer the housing subsidy program.
- b. Grantee shall be able to provide administrative assistance, data entry, database maintenance, processing of invoices, payments to landlords, creation of purchase service contracts, and payment policies.
- c. Grantee shall have a dedicated database or contemporary record keeping process to capture case planning, case management, consumer information tracking, purchased services, and dollars spent for consumers on housing subsidies.

2. Consumer Identification and Eligibility:

- a. The program shall have policies and procedures clearly defining eligibility criteria as well as the processes of application, decision, award, and recertification.
- b. The program shall have clear policies and procedures for waitlists and other program functions as needed.

3. Housing Subsidy Payments:

- a. The program shall have policies and procedures describing all aspects of housing subsidy determination, maximums and/or minimum subsidy amounts, urgent subsidy situations, etc.
- b. Rental subsidies for consumers can be set up to \$1,000 per household per month. The subsidy shall be set at the lowest possible amount needed to stabilize the housing.
- c. The subsidy amount is determined by each household's rent to income ratio. The goal will be to use the housing subsidy to bring the household rent to income ratio to 30%. In the cases where a \$1,000 monthly subsidy is insufficient to reach the 30% rent to income ratio, the subsidy amount can be used to pay up to 50% of the consumer's income towards the rent. Essential medical payments (insurance, prescriptions, medical bills) can be deducted from the household income for subsidy calculation.
- d. In limited cases, when a subsidy of \$1,000 is insufficient to reduce the rent to income ratio to 50%, it may be increased up to and not to exceed \$1,200 per month. For consumers receiving a subsidy above \$1,000, their eligibility and needs for the increased subsidy shall be clearly documented, as well as a plan to reduce the future subsidy to \$1,000 or less. During the periods when the monthly subsidy is above \$1,000, consumers shall undergo recertification every 6 months.

- e. Additional eligible payments under this program include back rent. Consumers who enroll into the program with back rent needs, may have up to 3 months of back rent paid, one time only, with the amount to be verified by the lease agreement and/or written communication with the landlord. Additional payments under this section shall be capped at \$5,000 total across all uses.
- f. Rent limits for consumers shall conform to HUD Fair Market Rents (FMR) for San Francisco Metro Area.
- g. Grantee must clearly demonstrate linkages to existing resources for income and other resources.
- h. Grantee will work to ensure sub-standard housing issues are addressed. When evaluating housing situation, an apartment inspection checklist will be utilized to ensure that units meet minimum safety guidelines. If consumers are living in sub-standard housing, subsidies can be used to pay rent on a new unit.
- i. Grantee will ensure that all housing subsidies paid for program consumers are reasonable, prudent, and properly procured.

4. Housing Subsidy Recertification:

- a. Grantee shall have policies and procedures regarding the process of recertification.
- b. Subsidies must be recertified at least annually, and more frequently if there are concerns about the household's non-compliance, lack of progress, or if sub-standard housing or safety issues are present. Consumers with short-term needs shall be recertified at more frequent intervals to ensure continued eligibility.
- c. Subsidies shall be need-based as opposed to time-limited. The subsidy may be renewed if consumers are engaged in their identified plan and continue to meet program eligibility requirements.

5. Case Planning:

- a. Grantee shall have policies and procedures outlining the provision of case planning. Program consumers must participate in a case plan designed to stabilize their housing.
- b. Case plan goals may include but are not limited to:
 - i. Actions to increase income and access to other available resources which help lower overall household expenses.
 - ii. Actions to improve credit history and rental stability.
 - iii. Efforts to address behavioral health issues that negatively impact housing stability.
 - iv. Efforts to access more affordable housing, including applying to appropriate waitlists.
- c. Grantee shall be familiar with other community resources and assist consumers in connecting with other resources as needed. Grantee shall work collaboratively with other organizations that are working with the consumer in order to resolve housing issues if applicable.

Grantee may enhance the subsidy model described with additional components that will be effective in achieving successful outcomes.

VII. Service Objectives

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

1. Grantee will provide housing subsidies for at least **60** unduplicated consumers.
2. Grantee will provide at least **700** months of housing subsidies. One unit of service is one monthly subsidy payment.
3. Grantee will transition at least **6** unduplicated consumers off the housing subsidy program.

VIII. Outcome Objectives

Outcome objectives will be measured through analysis of program data reported, plus the administration of an annual consumer survey by Grantee. Actual survey question structure and survey administration shall be approved by DAS/OCP staff in advance of survey release. Survey completion rate shall be 65% of total program consumers during the fiscal year.

1. Housing Retention Outcomes
 - a. At least **85%** of consumers are stably housed for 6 months after subsidies began.
 - b. At least **75%** of consumers remain stably housed for 12 months after subsidies began.
2. Consumer Satisfaction Outcomes
 - a. At least **75%** of consumers indicate that they were treated in a respectful and professional manner by program staff.
 - b. At least **75%** of consumers who received housing subsidies report that the subsidies have helped them keep stable housing.

IX. Reporting Requirements

Grantee will provide various reports during the term of the grant agreement:

1. Grantee shall enter consumers' data into the SF DAS GetCare database system as required by DAS analyst staff. This shall include SOGI data.
2. Grantee shall enter all the units of service into the SF GetCare Service by the 5th working day of the month for the preceding month.
3. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS/OCP and OCM staff.
4. Grantee program staff shall complete the California Department of Aging (CDA) Security Awareness training and SF DAS Elder Abuse Prevention and Mandated Reporter Training on an annual basis. Grantee shall maintain the evidence of staff completion of the training.
5. Grantee shall submit response rates and aggregated data from the annual consumer satisfaction survey to OCP staff by March 15th of each grant year.

6. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 of each grant year.
7. Grantee shall develop and deliver ad hoc reports as requested by DAS/OCP.
8. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
9. Apart from reports to be sent via email to the Program Analyst and/or Contract Manager, all other reports and communications shall be sent to the following addresses:

Tahir Shaikh
Senior Contracts Manager/RSA
P.O. Box 7988
San Francisco, CA 94120
Tahir.shaikh@sfgov.org

Zhiqing Li
DAS, Office of Community Partnerships
P.O. Box 7988
San Francisco, CA 94120
Zhiqing.li@sfgov.org

X. Monitoring Activities

1. **Program Monitoring:** Program monitoring will include review of compliance with specific program standards or requirements, documentation of consumer eligibility and targeted mandates, records of the units of services and all reports, progress of service and outcome objectives, consumer records' collection and maintenance, reporting performance including monthly service unit reports on SF DAS Getcare, current organizational chart, evidence of program staff's training on Elder Abuse Reporting and California Department of Aging (CDA) Security Awareness Training, written policies and procedures manuals of all DAS/OCP funded programs, written project income policies if applicable, grievance procedure posted onsite and provided for the homebound consumers, site chart with updated hours of operation, a list of board of directors with age and ethnicity information, and outcomes of service provision according to Sections VI, VII, and VIII.
2. **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, and HIPAA compliance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Agency Name: Self-Help for the Elderly				Grant Term:	7/1/24 - 6/30/28
(Check One) New	<input checked="" type="checkbox"/>	Renewal	Modification	Internal Revision	
If modification, Effective Date:			Modification No.:		
Program Name: Housing Subsidies					
	FY 24/25	FY 25/26	FY 26/27	FY 27/28	Total
	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/27 - 6/30/28	7/1/24 - 6/30/28
Expenditures					
Salaries & Benefits	\$316,223	\$325,708	\$335,481	\$345,547	\$1,322,959
Operating Expenses	\$37,770	\$39,028	\$40,310	\$41,610	\$158,718
Subtotal	\$353,993	\$364,736	\$375,791	\$387,157	\$1,481,677
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Costs (Line 16 X Line 15)	\$140,826	\$145,051	\$147,952	\$150,911	\$584,740
Consultant/Subcontractor (\$25,000+)					
Direct Client Pass-Through (subsidies)	\$584,847	\$602,269	\$610,554	\$618,915	\$2,416,585
Capital Expenses/Subcontractor					\$0
Total Expenses	\$1,079,666	\$1,112,056	\$1,134,297	\$1,156,983	\$4,483,002
HSA Revenues					
Total HSA Revenues	\$1,079,666	\$1,112,056	\$1,134,297	\$1,156,983	\$4,483,002
Other Program Revenues					
In-Kind Match	\$20,000	\$20,000	\$20,000	\$20,000	\$80,000
Total Other Program Revenues	\$20,000	\$20,000	\$20,000	\$20,000	\$80,000
Total DAS and NON DAS Revenues	\$1,099,666	\$1,132,056	\$1,154,297	\$1,176,983	\$4,563,002
Prepared by:	Leny Nair		Telephone No.:	415-677-7682	
				Date: 5/17/2024	
HSA Budget Form (2/22/24)					

Agency Name: Self-Help for the Elderly
Program Name: Housing Subsidies

Salaries & Benefits Detail

POSITION TITLE	Agency Totals		HSA Program		FY 24/25	FY 25/26	FY 26/27	FY 27/28	Total
	Annual Full	Total FTE	% FTE	Adjusted	7/1/24-6/30/25	7/1/25-6/30/26	7/1/26-6/30/27	7/1/27-6/30/28	7/1/24 - 6/30/28
Director of Social Service	\$115,000	1.00	10%	0.10	\$11,500	\$11,845	\$12,200	\$12,566	\$48,111
Program Manager	\$85,000	1.00	10%	0.10	\$8,500	\$8,755	\$9,018	\$9,289	\$35,562
Housing Program Supervisor	\$66,560	1.00	75%	0.75	\$49,920	\$51,418	\$52,961	\$54,550	\$208,849
Housing Program Coordinator	\$56,160	1.00	50%	0.50	\$28,080	\$28,922	\$29,790	\$30,684	\$117,476
Housing Program Assistant	\$49,920	1.00	75%	0.75	\$37,440	\$38,563	\$39,720	\$40,912	\$156,635
Housing Program Assistant	\$47,840	1.00	75%	0.75	\$35,880	\$36,956	\$38,065	\$39,207	\$150,108
Housing Program Assistant	\$47,840	1.00	75%	0.75	\$35,880	\$36,956	\$38,065	\$39,207	\$150,108
Accountant I - Housing Subsidies	\$50,000	1.00	100%	1.00	\$50,000	\$51,500	\$53,045	\$54,636	\$209,181
TOTALS	\$518,320	8.00	470%	4.70	\$257,200	\$264,915	\$272,864	\$281,051	\$1,076,030
FRINGE BENEFIT RATE	23%								
EMPLOYEE FRINGE BENEFITS	\$129,580				\$59,023	\$60,793	\$62,617	\$64,496	\$246,929
TOTAL SALARIES & BENEFITS	\$647,900	8.00	470%	4.70%	\$316,223	\$325,708	\$335,481	\$345,547	\$1,322,959

Agency Name: Self-Help for the Elderly
Program Name: Housing Subsidies

Operating Expenses Detail

Expenditure Category					Total
	FY 24/25	FY 25/26	FY 26/27	FY 27/28	FY 24/28
	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/27 - 6/30/28	7/1/24 - 6/30/28
Rental of Property	\$16,000	\$16,480	\$16,975	\$17,484	\$ 66,939
Utilities(Elec, Water, Gas, Phone, Garbage)	\$1,400	\$1,450	\$1,500	\$1,550	\$ 5,900
Office Supplies, Postage	\$2,000	\$2,000	\$2,000	\$2,000	\$ 8,000
Building Maintenance Supplies and Repair	\$2,500	\$2,500	\$2,500	\$2,500	\$ 10,000
Printing and Reproduction	\$500	\$500	\$500	\$500	\$ 2,000
Insurance	\$7,620	\$7,848	\$8,085	\$8,326	\$ 31,879
Licenses/Fee	\$0	\$0	\$0	\$0	\$ -
Staff Training	\$500	\$500	\$500	\$500	\$ 2,000
Staff Travel-(Local & Out of Town)	\$750	\$750	\$750	\$750	\$ 3,000
Rental of Equipment	\$500	\$500	\$500	\$500	\$ 2,000
CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE					
OTHER					
Recruitment Expenses	\$500	\$500	\$500	\$500	\$ 2,000
Communications	\$5,500	\$6,000	\$6,500	\$7,000	\$ 25,000
TOTAL OPERATING EXPENSE	\$37,770	\$39,028	\$40,310	\$41,610	\$158,718