

Department of Benefits and Family Support		MEMORANDUM
Department of Disability and Aging Services	TO:	DISABILITY AND AGING SERVICES COMMISSION
	THROUGH:	KELLY DEARMAN, EXECUTIVE DIRECTOR
	FROM:	CINDY KAUFFMAN, DEPUTY DIRECTOR ESPERANZA ZAPIEN, DIRECTOR OF CONTRACTS
P.O. Box 7988 San Francisco, CA	DATE:	JUNE 5, 2024
94120-7988 www.SFHSA.org	SUBJECT:	NEW GRANTS: MULTIPLE PROVIDERS (NON- PROFIT) TO PROVIDE RENTAL ASSISTANCE DEMONSTRATION (RAD) SUPPORTIVE SERVICES
	GRANT TERM:	7/1/2024-6/30/2028
	GRANT AMOUNT:	New \$8,292,608Contingency \$829,261Total \$9,121,869
	ANNUAL AMOUNT	$\frac{FY 24/25}{\$1,996,430} \frac{FY 25/26}{\$2,056,326} \frac{FY 26/27}{\$2,100,451} \frac{FY 27/28}{\$2,139,401}$
London Breed Mayor Trent Rhorer Executive Director	Funding Source FUNDING: PERCENTAGE:	CountyStateFederalContingencyTotal\$8,292,608\$829,261\$9,121,869100%100%

The Department of Disability and Aging Services (DAS) requests authorization to enter into new grant agreements with multiple providers for the period of July 1, 2024 through June 30, 2028, in an amount of \$8,292,608, plus a 10% contingency for a total amount not to exceed \$9,121,869 (see table on page 6 below). The purpose of these grants is to provide onsite supportive services within indicated Rental Assistance Demonstration (RAD) properties.

Background

The Rental Assistance Demonstration (RAD) Program originated as an initiative from the US Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of this grant is to provide support services to older adults and adults with disabilities residing in San Francisco RAD converted housing development units, and to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

Historically, over a four-month period in early 2013, the City, including the Mayor's Office, the Mayor's Office of Housing and Community Development, and the City Administrator, met with the San Francisco Housing Authority (SFHA) and 72 different organizations to re-envision the work of the SFHA. A strategy was developed to address the long-term viability of the SFHA portfolio; the proposed strategy addressed critical immediate and long-term rehabilitation needs by attracting new capital and establishing an on-site supportive-services model in all RAD buildings.

Currently, the RAD program encompasses thirty-two (32) housing sites grouped into twelve (12) neighborhood clusters in San Francisco. The clusters have been developed based on the geographic location of the sites and on the type of households residing at each site (i.e. older adults, adults with disabilities, or family households), in order to facilitate referrals to neighborhood-based services. Twenty (20) of the 32 sites are designated for older adults and adults with disabilities; these are the sites that will be funded through these grants. The sites range in size from 40 to 276 units, while the clusters themselves range in size from 142 to 719 units; there are a total of 2,001 units spread over 20 sites.

Services to be Provided

Grantees will provide the following core activities under the listed service areas:

Outreach and Community Engagement

• Grantees will develop and maintain channels of communication with tenants through multiple avenues, such as newsletters, tenant meetings, monthly activity calendars, community building activities, and educational programs, among others, to foster positive relationships with tenants and enhance community living.

Service Connection

- Grantees will work to build relationships with neighborhood groups, city agencies, and community-based service providers to develop referral partnerships and onsite programming.
- Grantees will assist tenants in striving to meet identified needs and goals by offering needs assessments, information and referral services, crisis intervention and counseling services, and short-term case management, while also working to connect tenants with outside service providers and community services.

Housing Stability

• Grantees will provide information and direct outreach to help tenants maintain their housing and ensure that tenants' specific needs are met. Grantees will assist tenants in addressing and planning for matters related to housing, such as delinquent rent payments, safety concerns, remedy of incidents and/or lease violations, conflict resolutions, and communication with property management, among other areas.

For more specific information regarding the services to be provided at each housing site, please refer to the attached Appendices A.

Grantee Selection

Grantees were selected through Request for Proposals 2023-02C, which was competitively bid in collaboration with the San Francisco Mayor's Office of Housing and Community Development (MOHCD) in January of 2024.

Funding

Funding for these grant agreements is provided through County General Funds.

ATTACHMENTS

Bridge Housing Corp

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

462 Duboce Ave – Appendix A – Services to be Provided 462 Duboce Ave – Appendix B – Budget

Mission Dolores – Appendix A – Services to be Provided Mission Dolores – Appendix B – Budget

25 Sanchez Street – Appendix A – Services to be Provided 25 Sanchez Street – Appendix B – Budget

255 Woodside Ave – Appendix A – Services to be Provided 255 Woodside Ave – Appendix B – Budget

Bridge Housing Corp – Appendix F – Site Chart

Chinatown Community Development Center

227 Bay Street – Appendix A – Services to be Provided 227 Bay Street – Appendix B – Budget

990 Pacific Ave – Appendix A – Services to be Provided 990 Pacific Ave – Appendix B – Budget

Chinatown Community Development Center – Appendix F – Site Chart

HomeRise

1750 McAllister Street – Appendix A – Services to be Provided 1750 McAllister Street – Appendix B – Budget

666 Ellis Street – Appendix A – Services to be Provided 666 Ellis Street – Appendix B – Budget

HomeRise – Appendix F – Site Chart

Mercy Housing California

1760 Bush Street – Appendix A – Services to be Provided 1760 Bush Street – Appendix B – Budget

1880 Pine Street – Appendix A – Services to be Provided 1880 Pine Street – Appendix B – Budget

2698 California Street – Appendix A – Services to be Provided 2698 California Street – Appendix B – Budget 345 Arguello Blvd – Appendix A – Services to be Provided 345 Arguello Blvd – Appendix B – Budget

491 31st Ave. – Appendix A – Services to be Provided 491 31st Ave. – Appendix B – Budget

JFK Towers – Appendix A – Services to be Provided JFK Towers – Appendix B – Budget

Mercy Housing California – Appendix F – Site Chart

Tenderloin Neighborhood Development Corp 320-330 Clementina – Appendix A – Services to be Provided 320-330 Clementina – Appendix B – Budget

430 Turk – Appendix A – Services to be Provided 430 Turk – Appendix B – Budget

939-51 Eddy – Appendix A – Services to be Provided 939-51 Eddy – Appendix B – Budget

Rosa Parks (1251 Turk) – Appendix A – Services to be Provided Rosa Parks (1251 Turk) – Appendix B – Budget

350 Ellis – Appendix A – Services to be Provided 350 Ellis – Appendix B – Budget

Tenderloin Neighborhood Development Corp – Appendix F – Site Chart

Grantee	Site	FY 24/25	FY 25/26	FY 26/27	FY 27/28	Total	Contingency	Not to Exceed
Bridge Housing		A 110 A 10	*101 5 44	\$1 5 1 5 5 1	*1 * * *	\$ 400 0 7 4	A 40.00 -	***
Corporation	3850 18th Street	\$118,219	\$121,766	\$124,201	\$126,685	\$490,871	\$49,087	\$539,958
Bridge Housing Corporation	462 Duboce Ave	\$60,844	\$62,669	\$63,923	\$65,201	\$252,637	\$25,264	\$277,901
Bridge Housing	102 Dubbee Ave	\$00,011	\$02,009	\$05,725	φ03,201	<i>\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\</i>	\$23,201	φ277,901
Corporation	Mission Dolores	\$82,193	\$84,659	\$86,352	\$88,079	\$341,283	\$34,128	\$375,411
Bridge Housing								
Corporation	25 Sanchez Street	\$81,556	\$84,003	\$85,683	\$87,397	\$338,639	\$33,864	\$372,503
Bridge Housing	255 Woodside	*	¢100 550	*125 2 00	*125 512	* 40 4 0 * 0	* 40 40 *	*-------------
Corporation	Ave	\$119,177	\$122,753	\$125,208	\$127,712	\$494,850	\$49,485	\$544,335
Chinatown Community	207 D G	AC2 715		 		#0(4.550	\$26 A56	¢201.014
Development Center	227 Bay St	\$63,715	\$65,626	\$66,939	\$68,278	\$264,558	\$26,456	\$291,014
Chinatown Community	000 D: 6 - A	P.95 705	\$99.27C	\$00.042	¢01.942	\$255.9 <i>((</i>	\$25 597	¢201 452
Development Center	990 Pacific Ave	\$85,705	\$88,276	\$90,042	\$91,843	\$355,866	\$35,587	\$391,453
HomeRise	1750 McAllister	\$85,884	\$88,461	\$90,230	\$92,035	\$356,610	\$35,661	\$392,271
u D'		\$96.96 5	¢90.471	¢01.2(0	¢02.007	¢2(0,(02	¢2(0(9	\$20(750
HomeRise	666 Ellis	\$86,865	\$89,471	\$91,260	\$93,086	\$360,682	\$36,068	\$396,750
Mercy Housing California	1760 Bush Street	\$115,086	\$118,539	\$120,909	\$123,328	\$477,862	\$47,786	\$525,648
Mercy Housing California	1880 Pine Street	\$116,635	\$120,134	\$122,537	\$124,988	\$484,294	\$48,429	\$532,723
Werey Housing Camornia	2698 California	\$110,055	\$120,154	\$122,557	\$124,700	\$ 101,271	φ 1 0, 1 2 <i>)</i>	\$552,725
Mercy Housing California	Street	\$58,453	\$60,206	\$61,410	\$62,638	\$242,707	\$24,271	\$266,978
Mercy Housing California	345 Arguello Blvd	\$42,349	\$43,620	\$44,492	\$45,382	\$175,843	\$17,584	\$193,427
Werey Housing Camornia	545 Aigueno Diva	ψ-2,5-7	\$45,020	\$ 11,1 72	\$45,562	\$175,045	\$17,504	φ1 <i>)</i> 3, 1 27
Mercy Housing California	491 31st Ave.	\$44,208	\$45,534	\$46,445	\$47,373	\$183,560	\$18,356	\$201,916
Mercy Housing California	JFK Towers	\$81,659	\$84,109	\$85,791	\$87,507	\$339,066	\$33,907	\$372,973
Tenderloin Neighborhood	320-330	\$61,057	\$07,107	\$65,771	\$67,507	\$557,000	\$55,707	\$372,775
Development Corp	Clementina	\$359,717	\$370,509	\$377,919	\$385,477	\$1,493,622	\$149,362	\$1,642,984
Tenderloin Neighborhood	Clementinu	ψ555,717	\$570,505	ψ577,919	\$505,177	ψ1,19 <i>3</i> ,022	ψ119,502	\$1,012,901
Development Corp	430 Turk	\$85,773	\$88,346	\$90,113	\$91,916	\$356,148	\$35,615	\$391,763
Tenderloin Neighborhood					** - ;- * *			
Development Corp	939-51 Eddy	\$48,149	\$49,594	\$50,586	\$51,597	\$199,926	\$19,993	\$219,919
Tenderloin Neighborhood	j j		ĺ ĺ	ĺ ĺ	ĺ ĺ	Í		, í
Development Corp	Rosa Parks	\$174,821	\$180,066	\$186,667	\$187,340	\$728,894	\$72,889	\$801,783
Tenderloin Neighborhood								
Development Corp	350 Ellis	\$85,422	\$87,985	\$89,744	\$91,539	\$354,690	\$35,469	\$390,159
Totals		\$1,996,430	\$2,056,326	\$2,100,451	\$2,139,401	\$8,292,608	\$829,261	\$9,121,869

Rental Assistance Demonstration (RAD) Programs

Appendix A – Services to be Provided Bridge Housing Corporation RAD Housing Support Services at 3850 18th Street July 1, 2024 through June 30, 2028

I. Purpose

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of this grant is to provide support services to older adults and adults with disabilities residing in San Francisco RAD converted housing development units, and to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

Adult with a	A memory 18 to 50 years of any living with a dischility
	A person 18 to 59 years of age living with a disability
Disability At Risk of	To be considered at right of institutionalization is norman must have at a
Institutionalization	To be considered at risk of institutionalization, a person must have, at a
Institutionalization	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	Human Services Agency's Contracts Administration Reporting and Billing
CHILDOIN	Online (CARBON) system
City	City and County of San Francisco, a municipal corporation
Communities of Color	An inclusive and unifying term for persons who do not identify as White,
Communities of Color	who have been historically and systemically disadvantaged by
	institutionalized and interpersonal racism.
DAS	Department of Disability and Aging Services
Disability	A condition, or combination of conditions, attributable to a mental,
Disactify	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	Bridge Housing Corporation
Health and Wellness	Any service that supports and/or promotes tenants' health and well-being
Services	(i.e. Adult Day Health, nutrition programs, free health screenings, DAS
	services, etc.).
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,

II. Definitions

	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, as 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.
MOHCD	Mayor's Office of Housing and Community Development
OCM	Office of Contract Management, San Francisco Human Services Agency
OCP	Office of Community Partnerships, Department of Disability and Aging Services
Older Adult	Person who is 60 years or older, used interchangeably with "senior."
RAD	Rental Assistance Demonstration
Senior	Person who is 60 years or older, used interchangeably with "older adult."
SF-HSA	Human Services Agency of the City and County of San Francisco.
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 contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9).

III. Target Population

This program is designed to serve all ethnicities and populations in Grantee's RAD converted housing units, with focused expertise to promote the unique cultural needs which have been identified as demonstrating the greatest economic and social need:

- Persons with low income
- Persons who are socially isolated
- Persons with limited English-speaking proficiency
- Persons from communities of color
- Persons who identify as LGBTQ+
- Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be:

- An older adult, aged 60 years or over or
- An adult with a disability, aged 18-59 and
- Residing in housing units at the locations indicated below
- V. Location and Time of Services

Services will be provided at 3850 18th Street, Monday through Friday, during regular office hours of 8:30 a.m. to 5 p.m., during regular office hours of office hours, excluding holidays. On occasion, workshops or events will be provided after hours or on weekends.

VI. Description of Services and Program Requirements

- 1. Grantee will provide four categories of services to older adults and adults with disabilities under this grant:
 - i. Outreach
 - a. Establish and maintain positive relationships with tenants.
 - b. Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.
 - c. Contact all new tenants to invite them to join community activities.
 - d. Contact, interact, inform, and invite all tenants to make use of support services to assist with and address individual needs or issues. These efforts will include a variety of outreach techniques such as written messages in appropriate languages, flyers, brochures, telephone calls, open-house events, and emails (as available).
 - ii. Service Connection
 - a. Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
 - b. Provide service needs assessment, information and referral, crisis intervention, and counseling with individuals and groups of tenants, as needed.
 - c. Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
 - d. Provide short-term case management services to tenants as needed, while working to connect those with longer-term needs to ongoing case management services.
 - e. Serve as a liaison or advocate for tenants with other service providers.
 - f. Assist tenants in identifying and accessing community services needed to meet tenant's specific needs or to make progress toward identified goals.
 - iii. Housing Stability
 - a. Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
 - b. Conduct direct outreach to all tenants who become delinquent in rent

payments, and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.

- c. Conduct direct outreach to all tenants who are experiencing safety concerns or lease/house rule violations, or who have been involved in critical incidents.
- d. Provide information on various topics that will help tenants maintain their housing; provide assistance in communicating with, responding to, and meeting with property management to help tenancies resolve issues related to housing; provide assistance in the remedy of incidences and/or lease violations that could lead to eviction by establishing written plans; and/or provide assistance with conflict resolution for tenants who need to solve problems or resolve conflicts with other tenants.
- iv. Community Engagement
 - a. Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.
 - b. Provide tenants with opportunities to participate in organized gatherings for peer support, social connections, celebrations/commemorations, and other community events held onsite.
 - c. Provide trainings and educational workshops on a variety of topics relating to health, wellness, finance, housing, and other topics.
- 2. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS|OCP policy memoranda.
- 3. Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.
- 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS|OCP. Grantee will share the survey results with DAS|OCP by March 15th each grant year, or on a mutually agreed-upon date between DAS|OCP and Grantee.
- 5. Grantee will hire, train, and supervise .87 (leveraged and/or grant-funded) to provide services.
- 6. Grantee will ensure adequate and culturally-competent staffing to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all program standards. Grantee will ensure services are available in the languages of the tenant population being served.
- 7. Grantee will ensure that units of service provided are tracked and distinguishable.
- 8. Grantee will attend in-service trainings and meetings coordinated and provided by DAS|OCP, and share the information with their staff and volunteers as needed. Grantee will attend RAD-related, MOHCD, and other meetings as needed.
- 9. Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- 10. Grantee is a mandated reporter for witnessed or suspected elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- 11. Grantee will communicate and collaborate regularly with DAS to help provide logistical and operational support to the program, to provide quality services to tenants, and to strategize program direction and services provision.

VII. Service Objectives

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

- Grantee will have individual and group service encounters with at least 65% of unduplicated tenants per month.
- Grantee will provide tenants with a minimum of two (2) activities or events per week (or 104 annually). Types of activities annually must be at least 10% trainings/workshops, 25% health- and wellness-related, and 65% all other.
- All (100%) of households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will provide services to 100% of unduplicated tenants annually. Services can be individual services, community activities, and/or outreach.

VIII. Outcome Objectives

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

- Tenants will feel connected to and involved with their tenant/resident community. At least 50% of unduplicated residents participating in the annual survey will feel "strongly" or "very strongly" about being connected to and involved with their tenant/resident community.
 - Grantee will use the following standardized question: How strongly do you feel connected to and involved with the tenant/resident community at [site]? The options to answer should be "very strongly," "strongly," "somewhat," and "not at all."
- Tenants will have better access to resources improving their health and wellness. At least 50% of unduplicated tenants participating in the annual survey will "agree" or "highly agree" that they have better access to resources that improve their health and wellness.
 - Grantee will use the following standardized question: Do you have better access to resources that increase your health and wellness? The options to answer should be "highly agree," "agree," "neutral," "disagree," and "highly disagree."
- Tenants will have stable housing. At least 95% of households will have obtained and/or maintained reliable, secure, and stable housing that meets the needs of individuals and households.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers into the grantee's database, using a DAS|OCP-approved intake form.

- 2. Annual and monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
 - a. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VIII (Outcome Objectives). This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th day of the month following the end of the program year.
 - i. Number and percentage of unduplicated tenants to whom services were provided annually.
 - ii. Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "strongly" or "very strongly" when asked about being connected to and involved with their tenant/resident community.
 - iii. Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "agree" or "highly agree" when asked about having better access to resources that improve their health and wellness.
 - iv. Number and percentage of households that have obtained and/or maintained stable housing.
 - b. Grantee will provide a monthly report of activities, referencing the tasks as described in Section VII (Service Objectives). Grantee will enter the monthly metrics in the CARBON database by the 15th day of the following month.
 - i. Number and percentage of unduplicated tenants with individual and group service encounters.
 - ii. Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - iii. Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- 3. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed-upon date between DAS|OCP and the Grantee.
- 4. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and a Security Awareness Training on an annual basis. The Grantee will maintain evidence of staff completion of these trainings.
- 5. Grantee will issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The Grantee must submit the report in CARBON.
- 6. Grantee will develop and deliver ad hoc reports as requested by SF-HSA, DAS, and

6 of 8

OCP.

- 7. Grantee will develop and deliver a bi-annual summary report of SOGI data collected as required by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10 (June-December data) and July 10 (January-June data).
- 8. Grantee will maintain an updated site chart, using the DAS|OCP approved form, with details about the program.
- 9. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable, and will take all reasonable efforts to implement HIPAA requirements.
- 10. Grantee will develop a grievance policy consistent with DAS|OCP policy memorandum.

For assistance with reporting requirements or submission of reports, contact:

Rocio Duenas Rocio.Duenas@sfgov.org Principal Contract Manager, Office of Contract Management Human Services Agency

or

Rosemarie Tocchini Rosemarie.Tocchini@sfgov.org Program Analyst, Office of Community Partnerships Department of Disability and Aging Services

X. Monitoring Activities

A. <u>Program Monitoring</u>: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates; backup documentation for the units of service and all reporting; progress of service and outcome objectives; the methods by which participant records are collected and maintained; reporting performance; maintenance of service unit logs; agency and organization standards, including a current organizational chart and evidence of provision of annual training to staff in Elder Abuse Prevention and Reporting and Security Awareness; review of program operation, including a review of a written policies-and-procedures manual of all OCP-funded programs; written project income polices if applicable; grievance procedure (must be posted in the center/office and distributed to those consumers who are homebound); site chart with current hours of operation; a board of director list; whether services are provided appropriately according to sections VII (Service Objectives) and VIII (Outcome Objectives); logs of service units based on hours of scheduled activities; sign-in sheets of consumers participating in each activity; and documentation showing the reported units of service are based on scheduled activities at the site.

B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, the quarterly balance sheet, the 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 the Personnel Manual, the Emergency Operations Plan, compliance with the Americans with Disabilities Act, subcontracts, MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	А	В	С	D	E	F
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2						
3	HUMAN	SERVICES AG	ENCY CONTRA	ACT BUDGET SU	IMMARY	
4			BY PROGRAM			
-	Orente e Nerre e	E		Ownerst Tammar		
5	Grantee Name:			Grant Term:		
6	BRIDGE Housing Corp			July 1, 2024 - June 3	30, 2028	
7 (Chec	ck One) New X Renewal Modific	ation				
	·					
0 11 1100	dification, Effective Date of Mod. N	o. of Mod.				
9 Progr	ram: 18th St - RAD Supportive Services					
						70741
	et Reference Page No.(s)					TOTAL
11 Progra		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
12	DAS Expenditures					
	ies & Benefits	\$91,212	\$93,867 \$12,016	. ,	\$99,323	\$380,944
	ating Expense al Expenditure	\$11,587	\$12,016	\$11,459	\$10,838	\$45,900 \$(
16 Subto		\$102,799	\$105,883	\$108,001	\$110,161	\$426,844
	ct Percentage (%) (max. 15%)		15%	15%		¢0,0 .
	ct Cost (Line 16 X Line 17)	15% \$15,420	\$15,883	\$16,200	15% \$16,524	\$64,027
	DAS Expenditures	\$118,219	\$121,766	\$124,201	\$126,685	\$490,87
20	Developer Match Expenditures	\$110,210	<i><i><i>ϕ</i></i>¹²¹,700</i>	¥124,201	\$120,000	\$ 400,01
	ies & Benefits	\$81,679	\$85,941	\$90,388	\$95,056	\$353,064
	ating Expense	\$2,091	\$1,662	\$2,219	\$2,840	\$8,812
	al Expenditure	\$0	\$0	\$0	\$0	\$0,012
24 Subto		\$83,770	\$87,603	\$92,607	\$97,896	\$361,870
25 Indire	ct Percentage (%)	15%	15%	15%	15%	
	ct Cost (Line 16 X Line 17)	\$12,565	\$13,140	\$13,891	\$14,684	\$54,282
	Developer Expenditures	\$96,335	\$100,744	\$106,498	\$112,581	\$416,15
28			, ,			. ,
29 Total	DAS and Developer Expenditures	\$214,554	\$222,510	\$230,699	\$239,266	\$907,028
30	DAS Revenues					
31 Local	General Fund	\$118,219	\$121,766	\$124,201	\$126,685	\$490,87 ²
32			· ·			· · · ·
33						
34						
35 36						
37						
38						
	AL DAS REVENUES	\$118,219	\$121,766	\$124,201	\$126,685	\$490,87 <i>°</i>
40	Developer Revenues	φ110,219	φ121,700	φ124,201	φ120,000	φ + 90,07
-	loper Match Funds	\$96,335	\$100,744	\$106,498	\$112,581	\$416,15
42		\$30,000	φ100,744	φ100,400	ψ112,001	φ+10,10
43						
44						
45 Total	Developer Revenues	\$96,335	\$100,744	\$106,498	\$112,581	\$416,15
46 Total	Revenues	\$214,554	\$222,510	\$230,699	\$239,266	\$907,02
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47 FUILT	ime Equivalent (FTE)					
49 Prepa	ared by:	-	Telephone No.		I	Date:
50 HSA-0	CO Review Signature:					
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2											
3 4	Grantee Name: BRIDGE Housing Corp										
	Program Name: 18th St - RAD Supportive Ser	vices									
6											
7				Salaries & E	Benefits	Detail					
8 9	DAS SALARIES & BENEFITS	ſ	7/1/2	4-6/30/25	7/1/2	5-6/30/26	7/1/20	6-6/30/27	7/1/27	-6/30/28	
10	DAG GALANILO U DENELITIO			ted Salary		eted Salary		ted Salary		ed Salary	TOTAL
11	POSITION TITLE	Annual Full Time Salary for FTE	FTE	SALARIES	FTE	SALARIES	FTE	SALARIES	FTE	SALARIES	7/1/24-6/30/28
11		-									
	Resident Services Supervisor	\$91,798	0.125	\$11,475	0.125	\$11,957	0.1250	\$12,403	0.1250	\$12,894	\$48,728
13	Service Coordinator	\$70,239	0.550	\$38,651	0.540	\$39,448	0.5300	\$40,264	0.5200	\$41,087	\$159,450
14	Service Coordinator	\$69,757	0.250	\$17,439	0.250	\$18,127	0.2500	\$18,846	0.2500	\$19,591	\$74,002
15											
16											
17											
18											
19											
20											
21											
22	TOTALS	\$231,794	0.925	\$67,564	0.915	\$69,531	0.905	\$71,512	0.895	\$73,572	\$282,181
23											
24		I									
25 26	EMPLOYEE FRINGE BENEFITS	l	35%	\$23,648	35%	\$24,336	35%	\$25,029	35%	\$25,750	\$98,763
27		-									
28	TOTAL DAS SALARIES & BENEFITS			\$91,212		\$93,867		\$96,542		\$99,323	\$380,944
29											
30	DEVELOPER MATCH POSITION TITLE										
31	Resident Services Supervisor	\$91,798	0.125	\$11,475	0.125	\$11,930	0.125	\$12,403	0.125	\$12,894	\$48,701
	Service Coordinator	\$70,239	0.450	\$31,589	0.460	\$33,604	0.470	\$35,706	0.480	\$37,927	\$138,825
	Service Coordinator	\$69,757	0.250	\$17,439	0.250	\$18,127	0.250	\$18,846	0.250	\$19,591	\$74,002
34	-	, , , , , , , , , , , , , , , , , , ,		,						,	+···,-34
35											
36											
37	TOTALS	\$231,794	0.825	\$60,503	0.835	\$63,660	0.845	\$66,954	0.855	\$70,412	\$261,529
38		φ201,734	0.020	ψ00,000	0.000	ψ00,000	0.040	ψ00,904	0.000	ψι 0, 4 12	ψ201,029
		[250/	¢04 470	250/	¢00.004	250/	¢00 404	250/	¢04 644	¢04 605
	EMPLOYEE FRINGE BENEFITS	l	35%	\$21,176	35%	\$22,281	35%	\$23,434	35%	\$24,644	\$91,535
40		I		AC /		AC		AC		AG	A
	TOTAL DEVELOPER SALARIES & BENEFITS			\$81,679		\$85,941		\$90,388		\$95,056	\$353,064
	TOTAL SALARIES & BENEFITS	l	1.750	\$172,891	1.750	\$179,809	1.750	\$186,930	1.750	\$194,379	\$734,008
43	HSA #2										
44											

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2 3								
4 Grantee Name: B								
5 Program Name: 1	8th St - RAD Su	pportive	Service	s				
7				Operat	ing Expense De	tail		
8				-				
9 10 DAS EXPENDITUR			TERM	7/1/24-6/30/25	7/1/25-6/30/26	7/1/26-6/30/27	7/1/27-6/30/28	TOTAL 7/1/24-6/30/28
11 Rental of Property						11120-0/00/21	111121-0/00/20	11124-0,00,20
12 Utilities(Elec, Wate	r, Gas, Phone, G	arbage)		\$5,016	\$5,016	\$5,016	\$5,016	\$20,064
13 Office Supplies, Pc	stage			\$6,571	\$7,000	\$6,443	\$5,822	\$25,836
14 Building Maintenar								
15 Printing and Repro								
16 Insurance								
17 Staff Training								
18 Staff Travel (Local	& Out of Town)							
19 Rental of Equipme	nt							
20								
21 CONSULTANTS								
22								
25			-					
26 OTHER								
29 30			-					
31			-		·			
32 TOTAL DAS OPE	RATING EXPENS	SE		\$11,587	\$12,016	\$11,459	\$10,838	\$45,900
33								
34 DEVELOPER MAT	CH OPERATING	FXPEN	ISF					
35 Rental of Property								
36 Utilities(Elec, Wate	r Gas Phone G	arbage)						
37 Program/Office Su		anzage)		\$429	\$0	\$557	\$1,178	\$12,694
38 Building Maintenar					\		<u>_</u>	
39 Printing and Repro								
40 Insurance								
41 Pangea/AASC				\$1,462	\$1,462	\$1,462	\$1,462	\$5,848
42 Staff Training				ψ1,402	ψ1,402	ψ1,402	ψ1,402	φ0,040
_	9 Out of Town)					0003	0001	
43Staff Travel (Local44Rental of Equipment				\$200	\$200	\$200	\$200	\$800
45 Rental of Equipment	н.							
46 TOTAL DEVELOP	ER OPERATING	EXPEN	SE	\$2,091	\$1,662	\$2,219	\$2,840	\$8,812
47 48 TOTAL OPERATIN	IG EXPENSE			\$13,678	\$13,678	\$13,678	\$13,678	\$54,712
49 50 HSA #3							<u>.</u>	

Appendix A – Services to be Provided Bridge Housing Corporation RAD Housing Support Services at 462 Duboce Avenue July 1, 2024 through June 30, 2028

I. Purpose

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of this grant is to provide support services to older adults and adults with disabilities residing in San Francisco RAD converted housing development units, and to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

A .114:41	A = 10 + 50 = 10 + 50 = 100
Adult with a	A person 18 to 59 years of age living with a disability
Disability	
At Risk of	To be considered at risk of institutionalization, a person must have, at a
Institutionalization	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	Human Services Agency's Contracts Administration Reporting and Billing
	Online (CARBON) system
City	City and County of San Francisco, a municipal corporation
Communities of Color	An inclusive and unifying term for persons who do not identify as White,
	who have been historically and systemically disadvantaged by
	institutionalized and interpersonal racism.
DAS	Department of Disability and Aging Services
Disability	A condition, or combination of conditions, 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	Bridge Housing Corporation
Health and Wellness	Any service that supports and/or promotes tenants' health and well-being
Services	(i.e. Adult Day Health, nutrition programs, free health screenings, DAS
LGBTQ+	services, etc.). An acronym/term used to refer to persons who self-identify as non-

II. Definitions

	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-	Any person who does not speak English well or is otherwise unable to
Speaking Proficiency	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, as 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
MOHOD	to qualify for the program.
MOHCD	Mayor's Office of Housing and Community Development
OCM	Office of Contract Management, San Francisco Human Services Agency
OCP	Office of Community Partnerships, Department of Disability and Aging
	Services
Older Adult	Person who is 60 years or older, used interchangeably with "senior."
RAD	Rental Assistance Demonstration
Senior	Person who is 60 years or older, used interchangeably with "older adult."
SF-HSA	Human Services Agency of the City and County of San Francisco.
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
	contractors that provide health care and social services to seek to collect and
	analyze data concerning the sexual orientation and gender identity of the
	clients they serve (Chapter 104, Sections 104.1 through 104.9).

III. Target Population

This program is designed to serve all ethnicities and populations in Grantee's RAD converted housing units, with focused expertise to promote the unique cultural needs which have been identified as demonstrating the greatest economic and social need:

- Persons with low income
- Persons who are socially isolated
- Persons with limited English-speaking proficiency
- Persons from communities of color
- Persons who identify as LGBTQ+
- Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be:

- An older adult, aged 60 years or over *or*
- An adult with a disability, aged 18-59 and
- Residing in housing units at the locations indicated below

V. Location and Time of Services

Services will be provided at 462 Duboce Avenue, San Francisco, CA, 94117, Monday through Friday, during regular office hours of 8:30 a.m. through 5:00 p.m., excluding holidays. On occasion, workshops or events will be provided after hours or on weekends.

VI. Description of Services and Program Requirements

- 1. Grantee will provide four categories of services to older adults and adults with disabilities under this grant:
 - i. Outreach
 - a. Establish and maintain positive relationships with tenants.
 - b. Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.
 - c. Contact all new tenants to invite them to join community activities.
 - d. Contact, interact, inform, and invite all tenants to make use of support services to assist with and address individual needs or issues. These efforts will include a variety of outreach techniques such as written messages in appropriate languages, flyers, brochures, telephone calls, open-house events, and emails (as available).
 - ii. Service Connection
 - a. Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
 - b. Provide service needs assessment, information and referral, crisis intervention, and counseling with individuals and groups of tenants, as needed.
 - c. Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
 - d. Provide short-term case management services to tenants as needed, while working to connect those with longer-term needs to ongoing case management services.
 - e. Serve as a liaison or advocate for tenants with other service providers.
 - f. Assist tenants in identifying and accessing community services needed to meet tenant's specific needs or to make progress toward identified goals.
 - iii. Housing Stability
 - a. Work cooperatively and as part of a team with property management staff to meet the needs of tenants.

- b. Conduct direct outreach to all tenants who become delinquent in rent payments, and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- c. Conduct direct outreach to all tenants who are experiencing safety concerns or lease/house rule violations, or who have been involved in critical incidents.
- d. Provide information on various topics that will help tenants maintain their housing; provide assistance in communicating with, responding to, and meeting with property management to help tenancies resolve issues related to housing; provide assistance in the remedy of incidences and/or lease violations that could lead to eviction by establishing written plans; and/or provide assistance with conflict resolution for tenants who need to solve problems or resolve conflicts with other tenants.
- iv. Community Engagement
 - a. Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.
 - b. Provide tenants with opportunities to participate in organized gatherings for peer support, social connections, celebrations/commemorations, and other community events held onsite.
 - c. Provide trainings and educational workshops on a variety of topics relating to health, wellness, finance, housing, and other topics.
- 2. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS|OCP policy memoranda.
- 3. Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.
- 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS|OCP. Grantee will share the survey results with DAS|OCP by March 15th each grant year, or on a mutually agreed-upon date between DAS|OCP and Grantee.
- 5. Grantee will hire, train, and supervise .32 (leveraged and/or grant-funded) to provide services.
- 6. Grantee will ensure adequate and culturally-competent staffing to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all program standards. Grantee will ensure services are available in the languages of the tenant population being served.
- 7. Grantee will ensure that units of service provided are tracked and distinguishable.
- 8. Grantee will attend in-service trainings and meetings coordinated and provided by DAS|OCP, and share the information with their staff and volunteers as needed. Grantee will attend RAD-related, MOHCD, and other meetings as needed.
- 9. Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- 10. Grantee is a mandated reporter for witnessed or suspected elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- 11. Grantee will communicate and collaborate regularly with DAS to help provide logistical and operational support to the program, to provide quality services to tenants, and to strategize

program direction and services provision.

VII. Service Objectives

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

- Grantee will have individual and group service encounters with at least 65% of unduplicated tenants per month.
- Grantee will provide tenants with a minimum of two (2) activities or events per week (or 104 annually). Types of activities annually must be at least 10% trainings/workshops, 25% health- and wellness-related, and 65% all other.
- All (100%) of households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will provide services to 100% of unduplicated tenants annually. Services can be individual services, community activities, and/or outreach.

VIII. Outcome Objectives

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

- Tenants will feel connected to and involved with their tenant/resident community. At least 50% of unduplicated residents participating in the annual survey will feel "strongly" or "very strongly" about being connected to and involved with their tenant/resident community.
 - Grantee will use the following standardized question: How strongly do you feel connected to and involved with the tenant/resident community at [site]? The options to answer should be "very strongly," "strongly," "somewhat," and "not at all."
- Tenants will have better access to resources improving their health and wellness. At least 50% of unduplicated tenants participating in the annual survey will "agree" or "highly agree" that they have better access to resources that improve their health and wellness.
 - Grantee will use the following standardized question: Do you have better access to resources that increase your health and wellness? The options to answer should be "highly agree," "agree," "neutral," "disagree," and "highly disagree."
- Tenants will have stable housing. At least 95% of households will have obtained and/or maintained reliable, secure, and stable housing that meets the needs of individuals and households.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant

agreement by entering the consumer data obtained from consumers into the grantee's database, using a DAS|OCP-approved intake form.

- 2. Annual and monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
 - a. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VIII (Outcome Objectives). This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th day of the month following the end of the program year.
 - i. Number and percentage of unduplicated tenants to whom services were provided annually.
 - ii. Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "strongly" or "very strongly" when asked about being connected to and involved with their tenant/resident community.
 - iii. Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "agree" or "highly agree" when asked about having better access to resources that improve their health and wellness.
 - iv. Number and percentage of households that have obtained and/or maintained stable housing.
 - b. Grantee will provide a monthly report of activities, referencing the tasks as described in Section VII (Service Objectives). Grantee will enter the monthly metrics in the CARBON database by the 15th day of the following month.
 - i. Number and percentage of unduplicated tenants with individual and group service encounters.
 - ii. Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - iii. Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- 3. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed-upon date between DAS|OCP and the Grantee.
- 4. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and a Security Awareness Training on an annual basis. The Grantee will maintain evidence of staff completion of these trainings.
- 5. Grantee will issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The Grantee must submit the report in CARBON.

- 6. Grantee will develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
- 7. Grantee will develop and deliver a bi-annual summary report of SOGI data collected as required by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10 (June-December data) and July 10 (January-June data).
- 8. Grantee will maintain an updated site chart, using the DAS|OCP approved form, with details about the program.
- 9. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable, and will take all reasonable efforts to implement HIPAA requirements.
- 10. Grantee will develop a grievance policy consistent with DAS|OCP policy memorandum.

For assistance with reporting requirements or submission of reports, contact:

Rocio Duenas Rocio.Duenas@sfgov.org Principal Contract Manager, Office of Contract Management Human Services Agency

or

Rosemarie Tocchini Rosemarie.Tocchini@sfgov.org Program Analyst, Office of Community Partnerships Department of Disability and Aging Services

X. Monitoring Activities

A. <u>Program Monitoring</u>: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates; backup documentation for the units of service and all reporting; progress of service and outcome objectives; the methods by which participant records are collected and maintained; reporting performance; maintenance of service unit logs; agency and organization standards, including a current organizational chart and evidence of provision of annual training to staff in Elder Abuse Prevention and Reporting and Security Awareness; review of program operation, including a review of a written policies-and-procedures manual of all OCP-funded programs; written project income polices if applicable; grievance procedure (must be posted in the center/office and distributed to those consumers who are homebound); site chart with current

hours of operation; a board of director list; whether services are provided appropriately according to sections VII (Service Objectives) and VIII (Outcome Objectives); logs of service units based on hours of scheduled activities; sign-in sheets of consumers participating in each activity; and documentation showing the reported units of service are based on scheduled activities at the site.

B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, the quarterly balance sheet, the 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 the Personnel Manual, the Emergency Operations Plan, compliance with the Americans with Disabilities Act, subcontracts, MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

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3 HUN	IAN SERVICES AG	ENCY CONTRA	ACT BUDGET SU	IMMARY	
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5 Grantee Name:			Grant Term:		
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6 BRIDGE Housing Co	•		July 1, 2024 - June 3	30, 2028	
7 (Check One) New X Renewal Mo					
8 If modification, Effective Date of Mod.	No. of Mod.				
9 Program: Duboce - RAD Supportive Serv	ces				
					TOTAL
10 Budget Reference Page No.(s) 11 Program Term	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
12 DAS Expenditures	1/1/24-0/30/25	//1/25-0/30/20	//1/20-0/30/27	111/21-0/30/20	//1/24-0/30/20
13 Salaries & Benefits	\$52,706	\$53,837	\$54,984	\$56,130	\$217,657
14 Operating Expense	\$202	\$657	\$602	\$566	\$2,027
15 Capital Expenditure	\$202	\$501	\$002	\$555	\$0
16 Subtotal	\$52,908	\$54,494	\$55,586	\$56,696	\$219,684
17 Indirect Percentage (%) (max. 15%)	15%	15%	15%	15%	
18 Indirect Cost (Line 16 X Line 17)	\$7,936	\$8,174	\$8.337	\$8,504	\$32,952
19 Total DAS Expenditures	\$60,844	\$62,669	\$63,923	\$65,201	\$252,637
20 Developer Match Expenditures					
21 Salaries & Benefits	\$71,313	\$75,122	\$79,136	\$83,341	\$308,913
22 Operating Expense	\$7,835	\$7,380	\$6,980	\$6,616	\$28,811
23 Capital Expenditure	\$0	\$0	\$0	\$0	\$0
24 Subtotal	\$79,148	\$82,502	\$86,116	\$89,957	\$337,724
25 Indirect Percentage (%)	15%	15%	15%	15%	
26 Indirect Cost (Line 16 X Line 17)	\$11,872	\$12,375	\$12,917	\$13,494	\$50,659
27 Total Developer Expenditures	\$91,021	\$94,878	\$99,033	\$103,451	\$388,382
28	+• • • • • • • • • • • • • • • • • • •	<i>+,</i>	+,	<i> </i>	+;
29 Total DAS and Developer Expenditures	\$151,865	\$157,546	\$162,956	\$168,652	\$641,019
30 DAS Revenues	· · · · · ·	, , , , ,	· · /· ·	+ ,	· · · · · ·
31 Local General Fund	\$60,844	\$62,669	\$63,923	\$65,201	\$252,637
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39 TOTAL DAS REVENUES	\$60,844	\$62,669	\$63,923	\$65,201	\$252,637
40 Developer Revenues	*	* • <i>•</i> • • • •	*** ***	• (• • •	
41 Developer Match Funds	\$91,021	\$94,878	\$99,033	\$103,451	\$388,382
42 43					
43					
44 45 Total Developer Revenues	\$91,021	\$94,878	\$99,033	\$103,451	\$388,382
46 Total Revenues	\$151,865	\$157,546	\$162,956	\$168,652	\$641,01
	φ131,005	φ157,540	φ102,900	φ100,032	φ041,01
47 Full Time Equivalent (FTE)					
49 Prepared by:	-	Telephone No.		[Date:
50 HSA-CO Review Signature:					
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	Grantee Name: BRIDGE Housing Corp										
	Program Name: Duboce - RAD Supportive Ser	rvices									
6											
7				Salaries & E	Benefits	Detail					
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9 10	DAS SALARIES & BENEFITS			1-6/30/25 ted Salary		5-6/30/26 eted Salary		5-6/30/27 ted Salary		ed Salary	TOTAL
		Annual Full Time									
11	POSITION TITLE	Salary for FTE	FTE	SALARIES	FTE	SALARIES	FTE	SALARIES	FTE	SALARIES	7/1/24-6/30/28
12	Resident Services Supervisor	\$91,798	0.125	\$11,475	0.125	\$11,930	0.1250	\$12,403	0.1250	\$12,894	\$48,701
13	Service Coordinator	\$68,917	0.400	\$27,567	0.390	\$27,950	0.3800	\$28,326	0.3700	\$28,684	\$112,527
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20											
21											
22	TOTALS	\$160,715	0.525	\$39,041	0.515	\$39,880	0.505	\$40,729	0.495	\$41,578	\$161,228
23 24											
	EMPLOYEE FRINGE BENEFITS		35%	\$13,664	35%	\$13,958	35%	\$14,255	35%	\$14,552	\$56,430
26		•									
27		I									
28	TOTAL DAS SALARIES & BENEFITS	l		\$52,706		\$53,837		\$54,984		\$56,130	\$217,657
29											
30	DEVELOPER MATCH POSITION TITLE										
31	Resident Services Supervisor	\$91,798	0.125	\$11,475	0.125	\$11,930	0.125	\$12,403	0.125	\$12,894	\$48,701
32	Service Coordinator	\$68,917	0.600	\$41,350	0.610	\$43,717	0.620	\$46,216	0.630	\$48,840	\$180,123
33											
34											
35											
36											
37	TOTALS	\$160,715	0.725	\$52,825	0.735	\$55,646	0.745	\$58,619	0.755	\$61,734	\$228,824
38		,									,.
	EMPLOYEE FRINGE BENEFITS]	35%	\$18,489	35%	\$19,476	35%	\$20,517	35%	\$21,607	\$80,088
		L	0070	Ψ10,103	0070	ψ10,τ0	0070	Ψ 2 0,017	0070	Ψ21,007	φ00,000
40]		¢74.040		AZE 400		¢70.400		¢00.044	¢000.040
	TOTAL DEVELOPER SALARIES & BENEFITS			\$71,313		\$75,122		\$79,136		\$83,341	\$308,913
	TOTAL SALARIES & BENEFITS	l	1.250	\$124,019	1.250	\$128,960	1.250	\$134,119	1.250	\$139,472	\$526,570
43	HSA #2										
44	1104 #2										

A	В	С	D	E	F G	Н	1	J K	L M
1		Ū				1			Appendix B, Page 3
2									
4 Grantee Name: E									
5 Program Name: I	ouboce - RAD Sι	upportiv	e Service	2					
7				Opera	ating Expen	se Deta	il		
8									TOTAL
9 10 DAS EXPENDITU	RE CATEGORY		TERM	7/1/24-6/30/25	7/1/25-6/3	0/26	7/1/26-6/30/27	7/1/27-6/30/28	7/1/24-6/30/28
11 Rental of Property									
12 Utilities(Elec, Wate	er, Gas, Phone, G	arbage)							
13 Office Supplies, P	ostage				<u> </u>	\$455	\$400	\$364	\$1,219
14 Building Maintena	nce and Repair								
15 Printing and Repro	oduction				. <u> </u>				
16 Insurance					<u></u>				
17 Staff Training									
18 Staff Travel (Local	& Out of Town)			\$202		\$202	\$202	2 \$202	\$808
19 Rental of Equipme	nt								
20									
21 CONSULTANTS					<u> </u>	<u> </u>			
24			_		. <u> </u>	<u> </u>			
25									
26 <u>OTHER</u> 30									
31			-						
32 TOTAL DAS OPE	RATING EXPEN	SE		\$202		\$657	\$602	2 \$566	\$2,027
33									
34 DEVELOPER MA	CH OPERATING	GEXPEN	NSE						
35 Rental of Property									
36 Utilities(Elec, Wate	er, Gas, Phone, G	arbage)		\$4,236		\$4,236	\$4,236	\$4,236	\$16,944
37 Program/Office Su	pplies, Postage			\$2,555		\$2,100	\$1,700	\$1,336	\$7,691
38 Building Maintena	nce and Repair				<u> </u>				
39 Printing and Repro	oduction								
40 Insurance									
41 Pangea/AASC				\$1,044		\$1,044	\$1,044	\$1,044	\$4,176
42 Staff Training					. <u> </u>				
43 Staff Travel (Local	& Out of Town)								
44 Rental of Equipme	nt								
45									
46 TOTAL DEVELOF	ER OPERATING	EXPEN	SE	\$7,835		\$7,380	\$6,980	\$6,616	\$28,811
48 TOTAL OPERATI	NG EXPENSE			\$8,037		\$8,037	\$7,582	2 \$7,182	\$30,838
49 50 HSA #3									

Appendix A – Services to be Provided Bridge Housing Corporation RAD Housing Support Services at Mission Dolores (1855 15th Street) July 1, 2024 through June 30, 2028

I. Purpose

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of this grant is to provide support services to older adults and adults with disabilities residing in San Francisco RAD converted housing development units, and to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

Adult with a A person 18 to 59 years of age living with a disability Disability 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 Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system City City and County of San Francisco, a municipal corporation Communities of Color An inclusive and unifying term for persons who do not identify as White, who have been historically and systemically disadvantaged by institutionalized and interpersonal racism. DAS Department of Disability and Aging Services Disability A condition, or combination of conditions, 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 e		
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	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

II. Definitions

assigned at birth. This includes, but is not limited to, lesbian, gay, bisexual,
transgender, genderqueer, and gender nonbinary.
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.
Having income at or below 300% of the federal poverty line, as 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.
Mayor's Office of Housing and Community Development
Office of Contract Management, San Francisco Human Services Agency
Office of Community Partnerships, Department of Disability and Aging
Services
Person who is 60 years or older, used interchangeably with "senior."
Rental Assistance Demonstration
Person who is 60 years or older, used interchangeably with "older adult."
Human Services Agency of the City and County of San Francisco.
Having few social relationships and few people to interact with regularly.
Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the
San Francisco Administrative Code to require City departments and
contractors that provide health care and social services to seek to collect and
analyze data concerning the sexual orientation and gender identity of the
clients they serve (Chapter 104, Sections 104.1 through 104.9).

III. Target Population

This program is designed to serve all ethnicities and populations in Grantee's RAD converted housing units, with focused expertise to promote the unique cultural needs which have been identified as demonstrating the greatest economic and social need:

- Persons with low income
- Persons who are socially isolated
- Persons with limited English-speaking proficiency
- Persons from communities of color
- Persons who identify as LGBTQ+
- Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be:

- An older adult, aged 60 years or over or
- An adult with a disability, aged 18-59 and
- Residing in housing units at the locations indicated below

V. Location and Time of Services

Services will be provided at 1855 15th Street, Monday through Friday, during regular office hours of 8:30 a.m. to 5:00 p.m., excluding holidays. On occasion, workshops or events will be provided after hours or on weekends.

VI. Description of Services and Program Requirements

- 1. Grantee will provide four categories of services to older adults and adults with disabilities under this grant:
 - i. Outreach
 - a. Establish and maintain positive relationships with tenants.
 - b. Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.
 - c. Contact all new tenants to invite them to join community activities.
 - d. Contact, interact, inform, and invite all tenants to make use of support services to assist with and address individual needs or issues. These efforts will include a variety of outreach techniques such as written messages in appropriate languages, flyers, brochures, telephone calls, open-house events, and emails (as available).
 - ii. Service Connection
 - a. Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
 - b. Provide service needs assessment, information and referral, crisis intervention, and counseling with individuals and groups of tenants, as needed.
 - c. Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
 - d. Provide short-term case management services to tenants as needed, while working to connect those with longer-term needs to ongoing case management services.
 - e. Serve as a liaison or advocate for tenants with other service providers.
 - f. Assist tenants in identifying and accessing community services needed to meet tenant's specific needs or to make progress toward identified goals.
 - iii. Housing Stability
 - a. Work cooperatively and as part of a team with property management staff to meet the needs of tenants.

- b. Conduct direct outreach to all tenants who become delinquent in rent payments, and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- c. Conduct direct outreach to all tenants who are experiencing safety concerns or lease/house rule violations, or who have been involved in critical incidents.
- d. Provide information on various topics that will help tenants maintain their housing; provide assistance in communicating with, responding to, and meeting with property management to help tenancies resolve issues related to housing; provide assistance in the remedy of incidences and/or lease violations that could lead to eviction by establishing written plans; and/or provide assistance with conflict resolution for tenants who need to solve problems or resolve conflicts with other tenants.
- iv. Community Engagement
 - a. Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.
 - b. Provide tenants with opportunities to participate in organized gatherings for peer support, social connections, celebrations/commemorations, and other community events held onsite.
 - c. Provide trainings and educational workshops on a variety of topics relating to health, wellness, finance, housing, and other topics.
- 2. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS|OCP policy memoranda.
- 3. Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.
- 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS|OCP. Grantee will share the survey results with DAS|OCP by March 15th each grant year, or on a mutually agreed-upon date between DAS|OCP and Grantee.
- 5. Grantee will hire, train, and supervise .74 (leveraged and/or grant-funded) to provide services.
- 6. Grantee will ensure adequate and culturally-competent staffing to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all program standards. Grantee will ensure services are available in the languages of the tenant population being served.
- 7. Grantee will ensure that units of service provided are tracked and distinguishable.
- 8. Grantee will attend in-service trainings and meetings coordinated and provided by DAS|OCP, and share the information with their staff and volunteers as needed. Grantee will attend RAD-related, MOHCD, and other meetings as needed.
- 9. Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- 10. Grantee is a mandated reporter for witnessed or suspected elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- 11. Grantee will communicate and collaborate regularly with DAS to help provide logistical and operational support to the program, to provide quality services to tenants, and to strategize program direction and services provision.

VII. Service Objectives

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

- Grantee will have individual and group service encounters with at least 65% of unduplicated tenants per month.
- Grantee will provide tenants with a minimum of two (2) activities or events per week (or 104 annually). Types of activities annually must be at least 10% trainings/workshops, 25% health- and wellness-related, and 65% all other.
- All (100%) of households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will provide services to 100% of unduplicated tenants annually. Services can be individual services, community activities, and/or outreach.

VIII. Outcome Objectives

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

- Tenants will feel connected to and involved with their tenant/resident community. At least 50% of unduplicated residents participating in the annual survey will feel "strongly" or "very strongly" about being connected to and involved with their tenant/resident community.
 - Grantee will use the following standardized question: How strongly do you feel connected to and involved with the tenant/resident community at [site]? The options to answer should be "very strongly," "strongly," "somewhat," and "not at all."
- Tenants will have better access to resources improving their health and wellness. At least 50% of unduplicated tenants participating in the annual survey will "agree" or "highly agree" that they have better access to resources that improve their health and wellness.
 - Grantee will use the following standardized question: Do you have better access to resources that increase your health and wellness? The options to answer should be "highly agree," "agree," "neutral," "disagree," and "highly disagree."
- Tenants will have stable housing. At least 95% of households will have obtained and/or maintained reliable, secure, and stable housing that meets the needs of individuals and households.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers into the grantee's

database, using a DAS|OCP-approved intake form.

- 2. Annual and monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
 - a. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VIII (Outcome Objectives). This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th day of the month following the end of the program year.
 - i. Number and percentage of unduplicated tenants to whom services were provided annually.
 - ii. Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "strongly" or "very strongly" when asked about being connected to and involved with their tenant/resident community.
 - iii. Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "agree" or "highly agree" when asked about having better access to resources that improve their health and wellness.
 - iv. Number and percentage of households that have obtained and/or maintained stable housing.
 - b. Grantee will provide a monthly report of activities, referencing the tasks as described in Section VII (Service Objectives). Grantee will enter the monthly metrics in the CARBON database by the 15th day of the following month.
 - i. Number and percentage of unduplicated tenants with individual and group service encounters.
 - ii. Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - iii. Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- 3. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed-upon date between DAS|OCP and the Grantee.
- 4. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and a Security Awareness Training on an annual basis. The Grantee will maintain evidence of staff completion of these trainings.
- 5. Grantee will issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The Grantee must submit the report in CARBON.

- 6. Grantee will develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
- 7. Grantee will develop and deliver a bi-annual summary report of SOGI data collected as required by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10 (June-December data) and July 10 (January-June data).
- 8. Grantee will maintain an updated site chart, using the DAS|OCP approved form, with details about the program.
- 9. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable, and will take all reasonable efforts to implement HIPAA requirements.
- 10. Grantee will develop a grievance policy consistent with DAS|OCP policy memorandum.

For assistance with reporting requirements or submission of reports, contact:

Rocio Duenas Rocio.Duenas@sfgov.org Principal Contract Manager, Office of Contract Management Human Services Agency

or

Rosemarie Tocchini Rosemarie.Tocchini@sfgov.org Program Analyst, Office of Community Partnerships Department of Disability and Aging Services

X. Monitoring Activities

A. <u>Program Monitoring</u>: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates; backup documentation for the units of service and all reporting; progress of service and outcome objectives; the methods by which participant records are collected and maintained; reporting performance; maintenance of service unit logs; agency and organization standards, including a current organizational chart and evidence of provision of annual training to staff in Elder Abuse Prevention and Reporting and Security Awareness; review of program operation, including a review of a written policies-and-procedures manual of all OCP-funded programs; written project income polices if applicable; grievance procedure (must be posted in the center/office and distributed to those consumers who are homebound); site chart with current hours of operation; a board of director list; whether services are provided appropriately according to sections VII (Service Objectives) and VIII (Outcome Objectives); logs of service units based on hours of scheduled activities; sign-in sheets of consumers participating in each activity; and documentation showing the reported units of service are based on scheduled activities at the site.

B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, the quarterly balance sheet, the 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 the Personnel Manual, the Emergency Operations Plan, compliance with the Americans with Disabilities Act, subcontracts, MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

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2]										
3	HUMA	AN SERVICES AG	ENCY CONTRA	ACT BUDGET SU	IMMARY						
4	1		BY PROGRAM								
	Oranta a Namari	•		One of Termin							
5	Grantee Name:			Grant Term:							
6	BRIDGE Housing Co	р		July 1, 2024 - June 3	30, 2028						
7	(Check One) New X Renewal Modit	ication									
ð	If modification, Effective Date of Mod.	No. of Mod.									
9	Program: Mission Dolores (15th St) RAD S	upportive Services									
						TOTAL					
	Budget Reference Page No.(s)					TOTAL					
	Program Term	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					
12											
	Salaries & Benefits	\$71,150	\$73,410		\$76,345	\$295,724					
	Operating Expense Capital Expenditure	\$322	\$207	\$269	\$246	\$1,044 \$0					
	Subtotal	\$71,472	\$73,617	\$75,089	\$76,591	\$296,768					
	Indirect Percentage (%) (max. 15%)	15%		15%		¢200;10					
	Indirect Cost (Line 16 X Line 17)	\$10,721	15% \$11,042	\$11,263	15% \$11,489	\$44,51					
	Total DAS Expenditures	\$82,193	\$84,659	\$86,352	\$88.079	\$341,28					
20		<i>\\</i> 02,100	¥0-1,000	¥00,002	\$00,010	40-1,20					
-	Salaries & Benefits	\$79,430	\$83,314	\$88,032	\$92,996	\$343,773					
	Operating Expense	\$12,273	\$12,388	\$12,326	\$12,349	\$49,334					
	Capital Expenditure	\$0	\$0	\$0	\$0	\$(
	Subtotal	\$91,703	\$95,702	\$100,357	\$105,345	\$393,10					
25	Indirect Percentage (%)	15%	15%	15%	15%	. ,					
	Indirect Cost (Line 16 X Line 17)	\$13,755	\$14,355	\$15,054	\$15,802	\$58,960					
	Total Developer Expenditures	\$105,458	\$110,057	\$115,411	\$121,147	\$452,073					
28		+,	* • • • • • • • • • • • • • • • • • •	, . ,	• • - • , • • •	+ • • = , • • •					
29	Total DAS and Developer Expenditures	\$187,651	\$194,716	\$201,763	\$209,226	\$793,350					
30					. ,	. ,					
31	Local General Fund	\$82,193	\$84,659	\$86,352	\$88,079	\$341,28					
32						. ,					
33											
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39		¢00.400	¢01 650	\$86,352	¢00 070	¢011 001					
<u>39</u> 40	Developer Revenues	\$82,193	\$84,659	\$00,35Z	\$88,079	\$341,283					
-	Developer Match Funds	\$105,458	\$110,057	\$115,411	\$121,147	\$452,073					
41		\$105,456	φ110,037	\$115,411	φ121,147	\$452,073					
43											
44											
	Total Developer Revenues	\$105,458	\$110,057	\$115,411	\$121,147	\$452,073					
46	Total Revenues	\$187,651	\$194,716	\$201,763	\$209,226	\$793,35					
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47	Full Time Equivalent (FTE)										
49	Prepared by:	-	Telephone No.		[Date:					
50	HSA-CO Review Signature:										
	-										
51	HSA #1										

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2											
3 4	Grantee Name: BRIDGE Housing Corp										
	Program Name: Mission Dolores (15th St) RAD Supportive Services										
6											
7	Salaries & Benefits Detail										
8		г	7/4/0	-6/30/25	7/4/0	5-6/30/26	7/4/0	6-6/30/27	7/4/07	-6/30/28	
9 10	DAS SALARIES & BENEFITS	·		ted Salary		eted Salary		ted Salary		ed Salary	TOTAL
		Annual Full Time									7/4/04 0/00/00
11	POSITION TITLE	Salary for FTE	FTE	SALARIES	FTE	SALARIES	FTE	SALARIES	FTE	SALARIES	7/1/24-6/30/28
	Service Coordinator	\$76,663	0.460	\$35,265	0.454	\$36,206	0.4410	\$36,576	0.4285	\$36,961	\$145,008
13	Service Coordinator	\$69,757	0.250	\$17,439	0.250	\$18,172	0.2500	\$18,846	0.2500	\$19,591	\$74,047
14											
15											
16											
17											
18											
19											
20											
21											
22	TOTALS	\$146,420	0.710	\$52,704	0.704	\$54,378	0.691	\$55,422	0.679	\$56,552	\$219,055
23		¢110,120	0.1.10	<i>402,101</i>	0.101	<i>Q</i> 1 , 0 1	0.001	<i>\</i> 000,122	0.010	<i>400,002</i>	\$210,000
24		1									
	EMPLOYEE FRINGE BENEFITS	l	35%	\$18,446	35%	\$19,032	35%	\$19,398	35%	\$19,793	\$76,669
26 27											
	TOTAL DAS SALARIES & BENEFITS			\$71,150		\$73,410		\$74,820		\$76,345	\$295,724
29		•									
30	DEVELOPER MATCH POSITION TITLE										
	Service Coordinator	76,663	0.540	\$41,398	0.546	43,543	0.559	46,363	0.572	49,295	\$180,599
	Gabrielle Sharp/Service Coordinator	69,757	0.250	\$41,398 \$17,439	0.250	18,172	0.250	18,846	0.250	19,591	\$74,047
33		09,101	0.200	Ψ17,408	0.200	10,172	0.200	10,040	0.200	13,031	ψ14,041
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34											\$0
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36		*	0 700	\$ 50.005	0 700	6 04 7 4 1	0.000	005.005	0.000	* ***	\$0
37		\$146,420	0.790	\$58,837	0.796	\$61,714	0.809	\$65,209	0.822	\$68,886	\$254,646
38		I									
39	EMPLOYEE FRINGE BENEFITS	l	35%	\$20,593	35%	\$21,600	35%	\$22,823	35%	\$24,110	\$89,126
40		г						<u> </u>			
41	TOTAL DEVELOPER SALARIES & BENEFITS			\$79,430		\$83,314		\$88,032		\$92,996	\$343,773
42	TOTAL SALARIES & BENEFITS	l	1.500	\$150,581	1.500	\$156,724	1.500	\$162,851	1.500	\$169,341	\$639,497
43											
44	HSA #2										

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2 3									
4 Grantee Name	: BRIDGE Housing								
	e: Mission Dolores	(15th St) RAD Su	pportive Service					
6				Opera	ating Expens	e Detai	il		
8				•	0.				
	TURE CATEGORY		TERM	7/1/24-6/30/25	7/1/25-6/30	1/26	7/1/26-6/30/27	7/1/27-6/30/28	TOTAL 7/1/24-6/30/28
11 Rental of Prope				1/1/24-0/30/23			111/20-0/30/21	111121-0/30/20	
	/ater, Gas, Phone, G	arbage)							
13 Office Supplies		0,							
14 Building Mainte					-				
15 Printing and Re									
16 Insurance									
17 Staff Training								-	
18 Staff Travel (Lo	cal & Out of Town)			\$322		\$207	\$269	\$246	\$1,044
19 Rental of Equip	ment								
20									
21 CONSULTANT	<u>s</u>								
22			_						
25			_						
26 OTHER									
29 30			-		<u> </u>				- <u></u>
31			-						
32 TOTAL DAS C	PERATING EXPEN	SE		\$322		\$207	\$269	\$246	\$1,044
33									
34 DEVELOPER	ATCH OPERATING	GEXPEN	ISE						
35 Rental of Prope	erty								
36 Utilities(Elec, V	/ater, Gas, Phone, G	arbage)		\$6,420	\$	6,420	\$6,420	\$6,420	\$25,680
37 Program/Office	Supplies, Postage			\$4,600	\$	4,600	\$4,600	\$4,600	\$18,400
38 Building Mainte	nance and Repair					<u> </u>			
39 Printing and Re	production				_				
40 Insurance									
41 Pangea/AASC				\$1,253	\$	1,253	\$1,253	\$1,253	\$5,010
42 Staff Training						\$115	\$53	\$76	\$244
43 Staff Travel (Lo	cal & Out of Town)								
44 Rental of Equip	ment								
45									
	OPER OPERATING	EXPEN	SE	\$12,273	\$1	2,388	\$12,326	\$12,349	\$49,334
47								* (* * *	\$ =0.0=0
48 TOTAL OPER/ 49	TING EXPENSE			\$12,595	\$1	2,595	\$12,595	\$12,595	\$50,378

Appendix A – Services to be Provided Bridge Housing Corporation RAD Housing Support Services at 25 Sanchez Street July 1, 2024 through June 30, 2028

I. Purpose

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of this grant is to provide support services to older adults and adults with disabilities residing in San Francisco RAD converted housing development units, and to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with a	A person 18 to 59 years of age living with a disability
Disability	
At Risk of	To be considered at risk of institutionalization, a person must have, at a
Institutionalization	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	Human Services Agency's Contracts Administration Reporting and Billing
~!	Online (CARBON) system
City	City and County of San Francisco, a municipal corporation
Communities of Color	An inclusive and unifying term for persons who do not identify as White,
	who have been historically and systemically disadvantaged by
	institutionalized and interpersonal racism.
DAS	Department of Disability and Aging Services
Disability	A condition, or combination of conditions, 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	Bridge Housing Corporation
Health and Wellness	Any service that supports and/or promotes tenants' health and well-being
Services	(i.e. Adult Day Health, nutrition programs, free health screenings, DAS
	services, etc.).
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, as 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.
MOHCD	Mayor's Office of Housing and Community Development
ОСМ	Office of Contract Management, San Francisco Human Services Agency
OCP	Office of Community Partnerships, Department of Disability and Aging Services
Older Adult	Person who is 60 years or older, used interchangeably with "senior."
RAD	Rental Assistance Demonstration
Senior	Person who is 60 years or older, used interchangeably with "older adult."
SF-HSA	Human Services Agency of the City and County of San Francisco.
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 contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9).

III. Target Population

This program is designed to serve all ethnicities and populations in Grantee's RAD converted housing units, with focused expertise to promote the unique cultural needs which have been identified as demonstrating the greatest economic and social need:

- Persons with low income
- Persons who are socially isolated
- Persons with limited English-speaking proficiency
- Persons from communities of color
- Persons who identify as LGBTQ+
- Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be:

- An older adult, aged 60 years or over *or*
- An adult with a disability, aged 18-59 and
- Residing in housing units at the locations indicated below

V. Location and Time of Services

Services will be provided at 25 Sanchez Street, Monday through Friday, during regular office hours of 8:30 a.m. to 5:00 a.m., excluding holidays. On occasion, workshops or events will be provided after hours or on weekends.

VI. Description of Services and Program Requirements

- 1. Grantee will provide four categories of services to older adults and adults with disabilities under this grant:
 - i. Outreach
 - a. Establish and maintain positive relationships with tenants.
 - b. Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.
 - c. Contact all new tenants to invite them to join community activities.
 - d. Contact, interact, inform, and invite all tenants to make use of support services to assist with and address individual needs or issues. These efforts will include a variety of outreach techniques such as written messages in appropriate languages, flyers, brochures, telephone calls, open-house events, and emails (as available).
 - ii. Service Connection
 - a. Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
 - b. Provide service needs assessment, information and referral, crisis intervention, and counseling with individuals and groups of tenants, as needed.
 - c. Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
 - d. Provide short-term case management services to tenants as needed, while working to connect those with longer-term needs to ongoing case management services.
 - e. Serve as a liaison or advocate for tenants with other service providers.
 - f. Assist tenants in identifying and accessing community services needed to meet tenant's specific needs or to make progress toward identified goals.
 - iii. Housing Stability
 - a. Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
 - b. Conduct direct outreach to all tenants who become delinquent in rent payments, and offer assistance in preparing rent payment plans and/or provide

referrals to outside money management services.

- c. Conduct direct outreach to all tenants who are experiencing safety concerns or lease/house rule violations, or who have been involved in critical incidents.
- d. Provide information on various topics that will help tenants maintain their housing; provide assistance in communicating with, responding to, and meeting with property management to help tenancies resolve issues related to housing; provide assistance in the remedy of incidences and/or lease violations that could lead to eviction by establishing written plans; and/or provide assistance with conflict resolution for tenants who need to solve problems or resolve conflicts with other tenants.
- iv. Community Engagement
 - a. Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.
 - b. Provide tenants with opportunities to participate in organized gatherings for peer support, social connections, celebrations/commemorations, and other community events held onsite.
 - c. Provide trainings and educational workshops on a variety of topics relating to health, wellness, finance, housing, and other topics.
- 2. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS|OCP policy memoranda.
- 3. Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.
- 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS|OCP. Grantee will share the survey results with DAS|OCP by March 15th each grant year, or on a mutually agreed-upon date between DAS|OCP and Grantee.
- 5. Grantee will hire, train, and supervise .72 (leveraged and/or grant-funded) to provide services.
- 6. Grantee will ensure adequate and culturally-competent staffing to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all program standards. Grantee will ensure services are available in the languages of the tenant population being served.
- 7. Grantee will ensure that units of service provided are tracked and distinguishable.
- 8. Grantee will attend in-service trainings and meetings coordinated and provided by DAS|OCP, and share the information with their staff and volunteers as needed. Grantee will attend RAD-related, MOHCD, and other meetings as needed.
- 9. Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- 10. Grantee is a mandated reporter for witnessed or suspected elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- 11. Grantee will communicate and collaborate regularly with DAS to help provide logistical and operational support to the program, to provide quality services to tenants, and to strategize program direction and services provision.

VII. Service Objectives

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

- Grantee will have individual and group service encounters with at least 65% of unduplicated tenants per month.
- Grantee will provide tenants with a minimum of two (2) activities or events per week (or 104 annually). Types of activities annually must be at least 10% trainings/workshops, 25% health- and wellness-related, and 65% all other.
- All (100%) of households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will provide services to 100% of unduplicated tenants annually. Services can be individual services, community activities, and/or outreach.

VIII. Outcome Objectives

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

- Tenants will feel connected to and involved with their tenant/resident community. At least 50% of unduplicated residents participating in the annual survey will feel "strongly" or "very strongly" about being connected to and involved with their tenant/resident community.
 - Grantee will use the following standardized question: How strongly do you feel connected to and involved with the tenant/resident community at [site]? The options to answer should be "very strongly," "strongly," "somewhat," and "not at all."
- Tenants will have better access to resources improving their health and wellness. At least 50% of unduplicated tenants participating in the annual survey will "agree" or "highly agree" that they have better access to resources that improve their health and wellness.
 - Grantee will use the following standardized question: Do you have better access to resources that increase your health and wellness? The options to answer should be "highly agree," "agree," "neutral," "disagree," and "highly disagree."
- Tenants will have stable housing. At least 95% of households will have obtained and/or maintained reliable, secure, and stable housing that meets the needs of individuals and households.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers into the grantee's database, using a DAS|OCP-approved intake form.

- 2. Annual and monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
 - a. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VIII (Outcome Objectives). This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th day of the month following the end of the program year.
 - i. Number and percentage of unduplicated tenants to whom services were provided annually.
 - ii. Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "strongly" or "very strongly" when asked about being connected to and involved with their tenant/resident community.
 - iii. Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "agree" or "highly agree" when asked about having better access to resources that improve their health and wellness.
 - iv. Number and percentage of households that have obtained and/or maintained stable housing.
 - b. Grantee will provide a monthly report of activities, referencing the tasks as described in Section VII (Service Objectives). Grantee will enter the monthly metrics in the CARBON database by the 15th day of the following month.
 - i. Number and percentage of unduplicated tenants with individual and group service encounters.
 - ii. Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - iii. Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- 3. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed-upon date between DAS|OCP and the Grantee.
- 4. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and a Security Awareness Training on an annual basis. The Grantee will maintain evidence of staff completion of these trainings.
- 5. Grantee will issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The Grantee must submit the report in CARBON.
- 6. Grantee will develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.

- 7. Grantee will develop and deliver a bi-annual summary report of SOGI data collected as required by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10 (June-December data) and July 10 (January-June data).
- 8. Grantee will maintain an updated site chart, using the DAS|OCP approved form, with details about the program.
- 9. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable, and will take all reasonable efforts to implement HIPAA requirements.
- 10. Grantee will develop a grievance policy consistent with DAS|OCP policy memorandum.

For assistance with reporting requirements or submission of reports, contact:

Rocio Duenas Rocio.Duenas@sfgov.org Principal Contract Manager, Office of Contract Management Human Services Agency

or

Rosemarie Tocchini Rosemarie.Tocchini@sfgov.org Program Analyst, Office of Community Partnerships Department of Disability and Aging Services

X. Monitoring Activities

A. <u>Program Monitoring</u>: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates; backup documentation for the units of service and all reporting; progress of service and outcome objectives; the methods by which participant records are collected and maintained; reporting performance; maintenance of service unit logs; agency and organization standards, including a current organizational chart and evidence of provision of annual training to staff in Elder Abuse Prevention and Reporting and Security Awareness; review of program operation, including a review of a written policies-and-procedures manual of all OCP-funded programs; written project income polices if applicable; grievance procedure (must be posted in the center/office and distributed to those consumers who are homebound); site chart with current hours of operation; a board of director list; whether services are provided appropriately according to sections VII (Service Objectives) and VIII (Outcome Objectives); logs of service units based on hours of scheduled activities; sign-in sheets of consumers participating in each activity; and documentation showing the reported units of service are based on scheduled activities at the site.

B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, the quarterly balance sheet, the 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 the Personnel Manual, the Emergency Operations Plan, compliance with the Americans with Disabilities Act, subcontracts, MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	В	С	D	E	F
1		1			Ар	pendix B, Page 1
2						
3	нима	N SERVICES AG	ENCY CONTRA	ACT BUDGET SU	IMMARY	
4			BY PROGRAM			
				0.17		
5	Grantee Name:			Grant Term:		
6	BRIDGE Housing Cor	р		July 1, 2024 - June 3	30, 2028	
7	(Check One) New X Renewal Mod	ification				
8	If modification, Effective Date of Mod.	No. of Mod.				
9	Program: Sanchez - RAD Supportive Servio	ces				
	Budget Reference Page No.(s)					TOTAL
	Program Term	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
12						
	Salaries & Benefits	\$70,666	\$72,965	\$74,293	\$75,606	\$293,53
	Operating Expense	\$252	\$81	\$214	\$392	\$93
	Capital Expenditure	¢70.040	¢70.046	¢74.507	¢75.000	\$004.46
	Subtotal	\$70,918	\$73,046	\$74,507	\$75,998	\$294,46
•••	Indirect Percentage (%) (max. 15%)	15%	15%	15%	15%	
	Indirect Cost (Line 16 X Line 17)	\$10,638	\$10,957	\$11,176	\$11,400	\$44,17
_	Total DAS Expenditures	\$81,556	\$84,003	\$85,683	\$87,397	\$338,63
20	· · ·					
	Salaries & Benefits	\$87,254	\$91,209	\$96,374	\$101,799	\$376,63
	Operating Expense	\$12,409	\$12,580	\$12,447	\$12,269	\$49,70
	Capital Expenditure	\$0	\$0	\$0	\$0	\$
	Subtotal	\$99,663	\$103,789	\$108,820	\$114,067	\$426,33
	Indirect Percentage (%)	15%	15%	15%	15%	
26	Indirect Cost (Line 16 X Line 17)	\$14,949	\$15,568	\$16,323	\$17,110	\$63,95
27	Total Developer Expenditures	\$114,612	\$119,357	\$125,143	\$131,177	\$490,29
28						
29	Total DAS and Developer Expenditures	\$196,168	\$203,360	\$210,827	\$218,574	\$828,92
30	DAS Revenues					
31	Local General Fund	\$81,556	\$84,003	\$85,683	\$87,397	\$338,63
32						
33						
34						
35 36						
30 37						
38		+ +				
		04 550	¢04.000	#05 000	#07.007	¢000.00
39		\$81,556	\$84,003	\$85,683	\$87,397	\$338,63
40	Developer Revenues	# 111.010	#440 0F7		6404 477	¢ 400 00
41 42	Developer Match Funds	\$114,612	\$119,357	\$125,143	\$131,177	\$490,29
42 43						
44						
44	Total Developer Revenues	\$114,612	\$119,357	\$125,143	\$131,177	\$490,29
-	·					
46	Total Revenues	\$196,168	\$203,360	\$210,827	\$218,574	\$828,92
47	Full Time Equivalent (FTE)					
49	Prepared by:	-	Telephone No.		[Date:
					•	
50	HSA-CO Review Signature:					
	HSA #1					

	А	В	С	D	E	F	G	Н	1	J	к
1		. – .				· · · ·				A	ppendix B, Page 2
2											
4	Grantee Name: BRIDGE Housing Corp										
	Program Name: Sanchez - RAD Supportive Services										
6											
7	Salaries & Benefits Detail										
8 9	DAS SALARIES & BENEFITS	ſ	7/1/24	-6/30/25	7/1/2	5-6/30/26	7/1/2	6-6/30/27	7/1/27	-6/30/28	
10	DAG GALARIEG & DEREI ITO			ted Salary		ted Salary		ted Salary		ed Salary	TOTAL
11	POSITION TITLE	Annual Full Time Salary for FTE	FTE	SALARIES	FTE	SALARIES	FTE	SALARIES	FTE	SALARIES	7/1/24-6/30/28
12	Resident Services Supervisor	\$91,798	0.125	\$11,475	0.125	\$11,930	0.1250	\$12,403	0.1250	\$12,894	\$48,701
13	Service Coordinator	\$71,079	0.575	\$40,871	0.570	\$42,119	0.555	\$42,630	0.5400	\$43,110	\$168,728
14											
15											
16											
17											
18											
19											
20											
21											
22 23	TOTALS	\$162,877	0.700	\$52,345	0.695	\$54,048	0.680	\$55,032	0.665	\$56,004	\$217,430
24											
	EMPLOYEE FRINGE BENEFITS		35%	\$18,321	35%	\$18,917	35%	\$19,261	35%	\$19,601	\$76,100
26 27											
	TOTAL DAS SALARIES & BENEFITS]		\$70,666		\$72,965		\$74,293		\$75,606	\$293,530
29		ı		<i><i></i></i>		¢12,000		<i><i></i></i>		<i><i></i></i>	\$200,000
30	DEVELOPER MATCH POSITION TITLE	0.1 700	0.075	6 04404	0.075	05 700	0.075	07.000	0.075		.
	Resident Services Supervisor	91,798	0.375	\$34,424	0.375	35,789	0.375	37,208	0.375	38,683	\$146,104
	Service Coordinator	71,079	0.425	\$30,209	0.430	31,774	0.445	34,180	0.460	36,723	\$132,886
33											
34											
35											
36											
37	TOTALS	\$162,877	0.800	\$64,633	0.805	\$67,562	0.820	\$71,388	0.835	\$75,406	\$278,989
38		r									
39	EMPLOYEE FRINGE BENEFITS	l	35%	\$22,621	35%	\$23,647	35%	\$24,986	35%	\$26,392	\$97,646
40											
41	TOTAL DEVELOPER SALARIES & BENEFITS			\$87,254		\$91,209		\$96,374		\$101,799	\$376,636
42	TOTAL SALARIES & BENEFITS		1.500	\$157,920	1.500	\$164,174	1.500	\$170,667	1.500	\$177,404	\$670,166
43											
44	HSA #2										

A	В	С	D	E	F G	н	J K	L M				
1								Appendix B, Page 3				
2												
4 Grantee Name: BRID			. .									
5 Program Name: Sanc	hez - RAD Su	ipportiv	e Servic	es								
7	Operating Expense Detail											
8								TOTAL				
10 DAS EXPENDITURE (CATEGORY		TERM	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				
11 Rental of Property												
12 Utilities(Elec, Water, G	as, Phone, Ga	arbage)				<u> </u>						
13 Office Supplies, Postag	ge											
14 Building Maintenance a	and Repair											
15 Printing and Reproduct	tion											
16 Insurance						<u> </u>						
17 Staff Training												
18 Staff Travel (Local & O	ut of Town)			\$252	\$81	\$21	4 \$392	\$939				
19 Rental of Equipment						<u> </u>						
20												
21 CONSULTANTS						<u> </u>						
24			<u>-</u>									
25												
26 OTHER												
30 31			-			·						
32 TOTAL DAS OPERAT	ING EXPENS	Е		\$252	\$81	\$21	4 \$392	\$939				
33						- ·						
34 DEVELOPER MATCH	OPERATING	EXPEN	ISE									
35 Rental of Property												
36 Utilities(Elec, Water, G	as, Phone, Ga	arbage)		\$5,016	\$5,016	\$5,01	6 \$5,016	\$20,064				
37 Program/Office Supplie	es, Postage			\$4,500	\$4,500	\$4,50	0 \$4,500	\$18,000				
38 Building Maintenance a	and Repair											
39 Printing and Reproduct	tion											
40 Insurance												
41 Pangea/AASC				\$1,253	\$1,253	\$1,25	3 \$1,253	\$5,010				
42 Staff Training				\$1,500	\$1,500	\$1,50	0 \$1,500	\$6,000				
43 Staff Travel (Local & O	ut of Town)			\$140	\$311	\$17	8 \$0	\$939				
44 Rental of Equipment												
45												
46 TOTAL DEVELOPER	OPERATING I	EXPEN	SE	\$12,409	\$12,580	\$12,44	7 \$12,269	\$49,703				
48 48 TOTAL OPERATING E	EXPENSE			\$12,661	\$12,661	\$12,66	1 \$12,661	\$50,642				
50 HSA #3												

Appendix A – Services to be Provided Bridge Housing Corporation RAD Housing Support Services at 255 Woodside Avenue July 1, 2024 through June 30, 2028

I. Purpose

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of this grant is to provide support services to older adults and adults with disabilities residing in San Francisco RAD converted housing development units, and to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

A 1 1. 1.1							
Adult with a	A person 18 to 59 years of age living with a disability						
Disability							
At Risk of	To be considered at risk of institutionalization, a person must have, at a						
Institutionalization	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	Human Services Agency's Contracts Administration Reporting and Billing						
	Online (CARBON) system						
City	City and County of San Francisco, a municipal corporation						
Communities of Color	An inclusive and unifying term for persons who do not identify as White,						
	who have been historically and systemically disadvantaged by						
	institutionalized and interpersonal racism.						
DAS	Department of Disability and Aging Services						
Disability	A condition, or combination of conditions, 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	Bridge Housing Corporation						
Health and Wellness	Any service that supports and/or promotes tenants' health and well-being						
Services	(i.e. Adult Day Health, nutrition programs, free health screenings, DAS						
	services, etc.).						
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						

II. Definitions

assigned at birth. This includes, but is not limited to, lesbian, gay, bisexual,
transgender, genderqueer, and gender nonbinary.
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.
Having income at or below 300% of the federal poverty line, as 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.
Mayor's Office of Housing and Community Development
Office of Contract Management, San Francisco Human Services Agency
Office of Community Partnerships, Department of Disability and Aging
Services
Person who is 60 years or older, used interchangeably with "senior."
Rental Assistance Demonstration
Person who is 60 years or older, used interchangeably with "older adult."
Human Services Agency of the City and County of San Francisco.
Having few social relationships and few people to interact with regularly.
Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the
San Francisco Administrative Code to require City departments and
contractors that provide health care and social services to seek to collect and
analyze data concerning the sexual orientation and gender identity of the
clients they serve (Chapter 104, Sections 104.1 through 104.9).

III. Target Population

This program is designed to serve all ethnicities and populations in Grantee's RAD converted housing units, with focused expertise to promote the unique cultural needs which have been identified as demonstrating the greatest economic and social need:

- Persons with low income
- Persons who are socially isolated
- Persons with limited English-speaking proficiency
- Persons from communities of color
- Persons who identify as LGBTQ+
- Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be:

- An older adult, aged 60 years or over or
- An adult with a disability, aged 18-59 and
- Residing in housing units at the locations indicated below

V. Location and Time of Services

Services will be provided at 255 Woodside Ave, San Francisco, CA, 94127, Monday through Friday, during regular office hours of 8:30 a.m. to 5:00 p.m., excluding holidays. On occasion, workshops or events will be provided after hours or on weekends.

VI. Description of Services and Program Requirements

- 1. Grantee will provide four categories of services to older adults and adults with disabilities under this grant:
 - i. Outreach
 - a. Establish and maintain positive relationships with tenants.
 - b. Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.
 - c. Contact all new tenants to invite them to join community activities.
 - d. Contact, interact, inform, and invite all tenants to make use of support services to assist with and address individual needs or issues. These efforts will include a variety of outreach techniques such as written messages in appropriate languages, flyers, brochures, telephone calls, open-house events, and emails (as available).
 - ii. Service Connection
 - a. Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
 - b. Provide service needs assessment, information and referral, crisis intervention, and counseling with individuals and groups of tenants, as needed.
 - c. Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
 - d. Provide short-term case management services to tenants as needed, while working to connect those with longer-term needs to ongoing case management services.
 - e. Serve as a liaison or advocate for tenants with other service providers.
 - f. Assist tenants in identifying and accessing community services needed to meet tenant's specific needs or to make progress toward identified goals.
 - iii. Housing Stability
 - a. Work cooperatively and as part of a team with property management staff to meet the needs of tenants.

- b. Conduct direct outreach to all tenants who become delinquent in rent payments, and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- c. Conduct direct outreach to all tenants who are experiencing safety concerns or lease/house rule violations, or who have been involved in critical incidents.
- d. Provide information on various topics that will help tenants maintain their housing; provide assistance in communicating with, responding to, and meeting with property management to help tenancies resolve issues related to housing; provide assistance in the remedy of incidences and/or lease violations that could lead to eviction by establishing written plans; and/or provide assistance with conflict resolution for tenants who need to solve problems or resolve conflicts with other tenants.
- iv. Community Engagement
 - a. Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.
 - b. Provide tenants with opportunities to participate in organized gatherings for peer support, social connections, celebrations/commemorations, and other community events held onsite.
 - c. Provide trainings and educational workshops on a variety of topics relating to health, wellness, finance, housing, and other topics.
- 2. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS|OCP policy memoranda.
- 3. Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.
- 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS|OCP. Grantee will share the survey results with DAS|OCP by March 15th each grant year, or on a mutually agreed-upon date between DAS|OCP and Grantee.
- 5. Grantee will hire, train, and supervise .85 (leveraged and/or grant-funded) to provide services.
- 6. Grantee will ensure adequate and culturally-competent staffing to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all program standards. Grantee will ensure services are available in the languages of the tenant population being served.
- 7. Grantee will ensure that units of service provided are tracked and distinguishable.
- 8. Grantee will attend in-service trainings and meetings coordinated and provided by DAS|OCP, and share the information with their staff and volunteers as needed. Grantee will attend RAD-related, MOHCD, and other meetings as needed.
- 9. Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- 10. Grantee is a mandated reporter for witnessed or suspected elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- 11. Grantee will communicate and collaborate regularly with DAS to help provide logistical and operational support to the program, to provide quality services to tenants, and to strategize program direction and services provision.

VII. Service Objectives

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

- Grantee will have individual and group service encounters with at least 65% of unduplicated tenants per month.
- Grantee will provide tenants with a minimum of two (2) activities or events per week (or 104 annually). Types of activities annually must be at least 10% trainings/workshops, 25% health- and wellness-related, and 65% all other.
- All (100%) of households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will provide services to 100% of unduplicated tenants annually. Services can be individual services, community activities, and/or outreach.

VIII. Outcome Objectives

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

- Tenants will feel connected to and involved with their tenant/resident community. At least 50% of unduplicated residents participating in the annual survey will feel "strongly" or "very strongly" about being connected to and involved with their tenant/resident community.
 - Grantee will use the following standardized question: How strongly do you feel connected to and involved with the tenant/resident community at [site]? The options to answer should be "very strongly," "strongly," "somewhat," and "not at all."
- Tenants will have better access to resources improving their health and wellness. At least 50% of unduplicated tenants participating in the annual survey will "agree" or "highly agree" that they have better access to resources that improve their health and wellness.
 - Grantee will use the following standardized question: Do you have better access to resources that increase your health and wellness? The options to answer should be "highly agree," "agree," "neutral," "disagree," and "highly disagree."
- Tenants will have stable housing. At least 95% of households will have obtained and/or maintained reliable, secure, and stable housing that meets the needs of individuals and households.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers into the grantee's

database, using a DAS|OCP-approved intake form.

- 2. Annual and monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
 - a. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VIII (Outcome Objectives). This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th day of the month following the end of the program year.
 - i. Number and percentage of unduplicated tenants to whom services were provided annually.
 - ii. Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "strongly" or "very strongly" when asked about being connected to and involved with their tenant/resident community.
 - iii. Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "agree" or "highly agree" when asked about having better access to resources that improve their health and wellness.
 - iv. Number and percentage of households that have obtained and/or maintained stable housing.
 - b. Grantee will provide a monthly report of activities, referencing the tasks as described in Section VII (Service Objectives). Grantee will enter the monthly metrics in the CARBON database by the 15th day of the following month.
 - i. Number and percentage of unduplicated tenants with individual and group service encounters.
 - ii. Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - iii. Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- 3. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed-upon date between DAS|OCP and the Grantee.
- 4. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and a Security Awareness Training on an annual basis. The Grantee will maintain evidence of staff completion of these trainings.
- 5. Grantee will issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The Grantee must submit the report in CARBON.

- 6. Grantee will develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
- 7. Grantee will develop and deliver a bi-annual summary report of SOGI data collected as required by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10 (June-December data) and July 10 (January-June data).
- 8. Grantee will maintain an updated site chart, using the DAS|OCP approved form, with details about the program.
- 9. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable, and will take all reasonable efforts to implement HIPAA requirements.
- 10. Grantee will develop a grievance policy consistent with DAS|OCP policy memorandum.

For assistance with reporting requirements or submission of reports, contact:

Rocio Duenas Rocio.Duenas@sfgov.org Principal Contract Manager, Office of Contract Management Human Services Agency

or

Rosemarie Tocchini Rosemarie.Tocchini@sfgov.org Program Analyst, Office of Community Partnerships Department of Disability and Aging Services

X. Monitoring Activities

A. <u>Program Monitoring</u>: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates; backup documentation for the units of service and all reporting; progress of service and outcome objectives; the methods by which participant records are collected and maintained; reporting performance; maintenance of service unit logs; agency and organization standards, including a current organizational chart and evidence of provision of annual training to staff in Elder Abuse Prevention and Reporting and Security Awareness; review of program operation, including a review of a written policies-and-procedures manual of all OCP-funded programs; written project income polices if applicable; grievance procedure (must be posted in the center/office and distributed to those consumers who are homebound); site chart with current hours of operation; a board of director list; whether services are provided appropriately according to sections VII (Service Objectives) and VIII (Outcome Objectives); logs of service units based on hours of scheduled activities; sign-in sheets of consumers participating in each activity; and documentation showing the reported units of service are based on scheduled activities at the site.

B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, the quarterly balance sheet, the 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 the Personnel Manual, the Emergency Operations Plan, compliance with the Americans with Disabilities Act, subcontracts, MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	А	В	С	D	E	F					
1					Ар	pendix B, Page 1					
2											
3	HUMA	AN SERVICES AG	ENCY CONTRA	ACT BUDGET SU	IMMARY						
4		E	BY PROGRAM								
5	Grantee Name:			Grant Term:							
				-							
6	BRIDGE Housing Cor	р		July 1, 2024 - June 3	30, 2028						
7	(Check One) New X Renewal Modification										
8	If modification, Effective Date of Mod.	No. of Mod.									
9	Program: Woodside - RAD Supportive Serv	vices									
10	Budget Reference Page No.(s)					TOTAL					
	Program Term	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					
12											
13	Salaries & Benefits	\$103,373	\$106,422	\$108,483	\$110,751	\$429,030					
	Operating Expense	\$259	\$318	\$393	\$303	\$1,273					
	Capital Expenditure		·			\$0					
16	Subtotal	\$103,632	\$106,740	\$108,876	\$111,054	\$430,303					
17	Indirect Percentage (%) (max. 15%)	15%	15%	15%	15%						
18	Indirect Cost (Line 16 X Line 17)	\$15,545	\$16,012	\$16,331	\$16,658	\$64,546					
	Total DAS Expenditures	\$119,177	\$122,753	\$125,208	\$127,712	\$494,850					
20											
21	Salaries & Benefits	\$64,469	\$68,056	\$72,908	\$77,807	\$283,241					
	Operating Expense	\$11,381	\$11,322	\$11,247	\$11,337	\$45,287					
	Capital Expenditure	\$0	\$0	\$0	\$0	\$0					
	Subtotal	\$75,850	\$79,378	\$84,155	\$89,144	\$328,528					
25	Indirect Percentage (%)	15%	15%	15%	15%						
	Indirect Cost (Line 16 X Line 17)	\$11,378	\$11,907	\$12,623	\$13,372	\$49,279					
	Total Developer Expenditures	\$87,228	\$91,284	\$96,779	\$102,516	\$377,807					
28		ψ07,220	ψ01,204	<i>\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\</i>	φ10 <u>2</u> ,010	<i>\\\</i>					
	Total DAS and Developer Expenditures	\$206,405	\$214,038	\$221,986	\$230,228	\$872,657					
30		ψ200,400	ψ2 14,000	Ψ <u>2</u> 21,000	<i>\\</i> 200,220	<i>\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\</i>					
	Local General Fund	\$119,177	\$122,753	\$125,208	\$127,712	\$494,850					
32		φ119,177	\$122,755	\$125,200	φ127,712	ə494,000					
33											
34											
35											
36											
37											
38											
39	TOTAL DAS REVENUES	\$119,177	\$122,753	\$125,208	\$127,712	\$494,850					
40	Developer Revenues										
41	Developer Match Funds	\$87,228	\$91,284	\$96,779	\$102,516	\$377,807					
42											
43											
44											
45	Total Developer Revenues	\$87,228	\$91,284	\$96,779	\$102,516	\$377,807					
46	Total Revenues	\$206,405	\$214,038	\$221,986	\$230,228	\$872,65					
47	Full Time Equivalent (FTE)										
49	Prepared by:		Telephone No.		[Date:					
50	HSA-CO Review Signature:										
50											
- 4	HSA #1										

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1										A	opendix B, Page 2	
2												
4	Grantee Name: BRIDGE Housing Corp											
	Program Name: Woodside - RAD Supportive S	Services										
6		Salaries & Benefits Detail										
7 8				Salaries & E	senetits	Detall						
9	DAS SALARIES & BENEFITS	ו	7/1/24	-6/30/25	7/1/2	5-6/30/26	7/1/26	6-6/30/27	7/1/27	-6/30/28		
10			Budge	ted Salary	Budge	ted Salary	Budge	ted Salary	Budget	ed Salary	TOTAL	
11	POSITION TITLE	Annual Full Time Salary for FTE	FTE	SALARIES	FTE	SALARIES	FTE	SALARIES	FTE	SALARIES	7/1/24-6/30/28	
12	Resident Services Supervisor	\$84,060	0.300	\$25,218	0.300	\$26,217	0.300	\$27,255	0.300	\$28,335	\$107,025	
13	Service Coordinator	\$73,892	0.695	\$51,355	0.685	\$52,615	0.6650	\$53,103	0.6470	\$53,703	\$210,776	
14												
15												
16												
17												
18												
19												
20												
21												
22 23	TOTALS	\$157,952	0.995	\$76,573	0.985	\$78,831	0.965	\$80,358	0.947	\$82,038	\$317,800	
24		r										
	EMPLOYEE FRINGE BENEFITS		35%	\$26,801	35%	\$27,591	35%	\$28,125	35%	\$28,713	\$111,230	
26 27												
	TOTAL DAS SALARIES & BENEFITS]		\$103,373		\$106,422		\$108,483		\$110,751	\$429,030	
29		L		\$100,010		<i></i>		\$100,400		<i>\\\\\\\\\\\\\</i>	\$420,000	
30	DEVELOPER MATCH POSITION TITLE	* ***		005.040		* ***		* • 7 • 5 5	0.000	* 22.025	* 107 005	
	Resident Services Supervisor	\$84,060	0.300	\$25,218	0.300	\$26,217	0.300	\$27,255	0.300	\$28,335	\$107,025	
	Service Coordinator	\$73,892	0.305	\$22,537	0.315	\$24,195	0.335	\$26,751	0.353	\$29,300	\$102,783	
33												
34												
35												
36												
37	TOTALS	\$157,952	0.605	\$47,755	0.615	\$50,412	0.635	\$54,006	0.653	\$57,635	\$209,808	
38		Г										
39	EMPLOYEE FRINGE BENEFITS	l	35%	\$16,714	35%	\$17,644	35%	\$18,902	35%	\$20,172	\$73,433	
40		г										
41	TOTAL DEVELOPER SALARIES & BENEFITS			\$64,469		\$68,056		\$72,908		\$77,807	\$283,241	
42	TOTAL SALARIES & BENEFITS	l	1.600	\$167,843	1.600	\$174,478	1.600	\$181,391	1.600	\$188,559	\$712,271	
43	HSA #2											
44	NJA #2											

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1		-		. –			-	-1	Appendix B, Page
2 3									
4 Grantee Name: BRIDGI									
5 Program Name: Woods	ide - RAD S	upport	ive Servi	ices					
7				Opera	ating Expense	Detai	il		
8									
9 10 DAS EXPENDITURE CA	TEGORY		TERM	7/1/24-6/30/25	7/1/25-6/30/20	6	7/1/26-6/30/27	7/1/27-6/30/28	TOTAL 7/1/24-6/30/28
11 Rental of Property			- Er dui						
12 Utilities(Elec, Water, Gas	, Phone, Gai	rbage)							
13 Office Supplies, Postage									
14 Building Maintenance and	d Repair								
15 Printing and Reproduction	n								
16 Insurance									
17 Staff Training									
18 Staff Travel (Local & Out	of Town)			\$259	\$3	18	\$393	\$303	\$1,273
19 Rental of Equipment									
20									
21 CONSULTANTS									
24									
25									
26 OTHER									
30									
	0 EVEEN0	_				40			<u> </u>
32 TOTAL DAS OPERATIN	G EXPENSE	=		\$259	\$3	18	\$393	\$303	\$1,27
33									
34 DEVELOPER MATCH O	PERATING	EXPEN	<u>SE</u>						
35 Rental of Property									
36 Utilities(Elec, Water, Gas		rbage)		\$2,904	\$2,9		\$2,904	\$2,904	\$11,610
37 Program/Office Supplies,				\$5,500	\$5,5	00	\$5,500	\$5,500	\$22,000
38 Building Maintenance and	•								
39 Printing and Reproduction	n								
40 Insurance									
41 Pangea/AASC				\$1,336	\$1,3		\$1,336	\$1,336	\$5,344
42 Staff Training				\$1,500	\$1,5		\$1,500	\$1,500	\$6,000
43 Staff Travel (Local & Out	of Town)			\$141	\$	82	\$7	\$97	\$1,273
44 Rental of Equipment									
45									
46 TOTAL DEVELOPER OF	PERATING E	XPENS	SE	\$11,381	\$11,3	22	\$11,247	\$11,337	\$45,28
48 TOTAL OPERATING EX	PENSE			\$11,640	\$11,6	40	\$11,640	\$11,640	\$46,560
49 50 HSA #3									
51									

Date:

3/12/2024

Agency: Bridge Housing Corporation

Contract Mailing Address: 600 California Street, Suite 900, San Francisco, CA 94108

Director: Susan Neufeld Paul

Program: Rental Assistance Demonstration Sites - Senior/Disabled Adult

Program Manager: Evan Krokowski

Fiscal Year:

2023-24

Phone Number: 415/321-3526

Phone Number: 415/321-4056

	(B) (C) (C) (C) (C) (C) (C) (C) (C) (C) (C		1		d
<u>SITES:</u> Name of Site	Mission Dolores	18th Street	Duboce	Sanchez	Woodside
Address and Zip	1855 15th Street, SF, 94103	3850 18th Street, SF, 94114	462 Duboce, SF, 94117	25 Sanchez, SF, 94114	255 Woodside, SF, 94127
Phone Number	415-872-9455	415-872-9001	415-703-0146	415-522-0203	415-682-7101
Fax Number	415-437-6711	415-252-7976	415-703-0144	415-522-0207	415-682-7107
Neighborhood	Mission/Castro	Mission/Castro	Mission/Castro	Mission/Castro	Mission/Castro
Supervisorial District No.	District 8	District 8	District 8	District 8	District 7
Bus Line #	Bus 14 and 49	Train J	Bus 22 and Train N	Bus 22, Train J, K, L, M, F	Bus 43 and 44, Train K and L
Person in Charge	Melissa Parker	Melissa Parker	Melissa Parker	Melissa Parker	Melissa Parker
Site Manager/Coordinator	Supervisor, Elizabeth Barrios -		Supervisor, Cecilia Tavares -	Cynthia Rodriguez - Supervisor, Rosemarie Bonifacio - RSC	Elham Fattah - Supervisor, Stella Tu - RSC
Additional Programs Offered at Site	and referral, advocacy, case	levercise class programs and	and referral, advocacy, case	Resident services - Information and referral, advocacy, case management, food distribution, exercise class, programs and activities,	Resident services - Information and referral, advocacy, case management, food distribution, exercise class, programs and activities,
Business Days	<u>X_Mon_X_Tue X_Wed</u> <u>X_Thur_X_Fri</u> SatSun	<u>X_Mon_X_Tue X_Wed</u> <u>X_Thur_X_Fri</u> SatSun	<u>X_Mon_X_Tue X Wed</u> <u>X_Thur_X_Fri</u> SatSun	<u>X_Mon_X_Tue X_Wed</u> <u>X_Thur_X_Fri</u> SatSun	<u>X_Mon_X_Tue X Wed</u> <u>X_Thur_X_Fri</u> SatSun
Business Hours	8:30 AM - 5:00 PM	8:30 AM - 5:00 PM			
Hours of Scheduled Programming (for DAS - Funded Programs)	M-F 8:30 AM - 5:00 PM	M-F 8:30 AM - 5:00 PM			
Total number of Service Days in FY	260	260	260	260	260
Number of Service Days Closed	8	8	8	8	8

Appendix A – Services to be Provided Chinatown Community Development Center RAD Housing Support Services at 227 Bay Street July 1, 2024 through June 30, 2028

I. Purpose

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of this grant is to provide support services to older adults and adults with disabilities residing in San Francisco RAD converted housing development units, and to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

A 1 1. • 1						
Adult with a	A person 18 to 59 years of age living with a disability					
Disability						
At Risk of	To be considered at risk of institutionalization, a person must have, at a					
Institutionalization	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	Human Services Agency's Contracts Administration Reporting and Billing					
	Online (CARBON) system					
City	City and County of San Francisco, a municipal corporation					
Communities of Color	An inclusive and unifying term for persons who do not identify as White,					
	who have been historically and systemically disadvantaged by					
	institutionalized and interpersonal racism.					
DAS	Department of Disability and Aging Services					
Disability	A condition, or combination of conditions, 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	Chinatown Community Development Center					
Health and Wellness	Any service that supports and/or promotes tenants' health and well-being					
Services	(i.e. Adult Day Health, nutrition programs, free health screenings, DAS					
	services, etc.).					
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,					

II. Definitions

	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, as 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.
MOHCD	Mayor's Office of Housing and Community Development
OCM	Office of Contract Management, San Francisco Human Services Agency
OCP	Office of Community Partnerships, Department of Disability and Aging Services
Older Adult	Person who is 60 years or older, used interchangeably with "senior."
RAD	Rental Assistance Demonstration
Senior	Person who is 60 years or older, used interchangeably with "older adult."
SF-HSA	Human Services Agency of the City and County of San Francisco.
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 contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9).

III. Target Population

This program is designed to serve all ethnicities and populations in Grantee's RAD converted housing units, with focused expertise to promote the unique cultural needs which have been identified as demonstrating the greatest economic and social need:

- Persons with low income
- Persons who are socially isolated
- Persons with limited English-speaking proficiency
- Persons from communities of color
- Persons who identify as LGBTQ+
- Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be:

- An older adult, aged 60 years or over or
- An adult with a disability, aged 18-59 and
- Residing in housing units at the locations indicated below
- V. Location and Time of Services

Services will be provided at 227 Bay Street, San Francisco, CA, 94133, Monday through Friday, during regular office hours of 9 a.m. to 5:30 p.m., excluding holidays. On occasion, workshops or events will be provided after hours or on weekends.

VI. Description of Services and Program Requirements

- 1. Grantee will provide four categories of services to older adults and adults with disabilities under this grant:
 - i. Outreach
 - a. Establish and maintain positive relationships with tenants.
 - b. Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.
 - c. Contact all new tenants to invite them to join community activities.
 - d. Contact, interact, inform, and invite all tenants to make use of support services to assist with and address individual needs or issues. These efforts will include a variety of outreach techniques such as written messages in appropriate languages, flyers, brochures, telephone calls, open-house events, and emails (as available).
 - ii. Service Connection
 - a. Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
 - b. Provide service needs assessment, information and referral, crisis intervention, and counseling with individuals and groups of tenants, as needed.
 - c. Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
 - d. Provide short-term case management services to tenants as needed, while working to connect those with longer-term needs to ongoing case management services.
 - e. Serve as a liaison or advocate for tenants with other service providers.
 - f. Assist tenants in identifying and accessing community services needed to meet tenant's specific needs or to make progress toward identified goals.
 - iii. Housing Stability
 - a. Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
 - b. Conduct direct outreach to all tenants who become delinquent in rent

payments, and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.

- c. Conduct direct outreach to all tenants who are experiencing safety concerns or lease/house rule violations, or who have been involved in critical incidents.
- d. Provide information on various topics that will help tenants maintain their housing; provide assistance in communicating with, responding to, and meeting with property management to help tenancies resolve issues related to housing; provide assistance in the remedy of incidences and/or lease violations that could lead to eviction by establishing written plans; and/or provide assistance with conflict resolution for tenants who need to solve problems or resolve conflicts with other tenants.
- iv. Community Engagement
 - a. Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.
 - b. Provide tenants with opportunities to participate in organized gatherings for peer support, social connections, celebrations/commemorations, and other community events held onsite.
 - c. Provide trainings and educational workshops on a variety of topics relating to health, wellness, finance, housing, and other topics.
- 2. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS|OCP policy memoranda.
- 3. Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.
- 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS|OCP. Grantee will share the survey results with DAS|OCP by March 15th each grant year, or on a mutually agreed-upon date between DAS|OCP and Grantee.
- 5. Grantee will hire, train, and supervise .56 (leveraged and/or grant-funded) to provide services.
- 6. Grantee will ensure adequate and culturally-competent staffing to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all program standards. Grantee will ensure services are available in the languages of the tenant population being served.
- 7. Grantee will ensure that units of service provided are tracked and distinguishable.
- 8. Grantee will attend in-service trainings and meetings coordinated and provided by DAS|OCP, and share the information with their staff and volunteers as needed. Grantee will attend RAD-related, MOHCD, and other meetings as needed.
- 9. Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- 10. Grantee is a mandated reporter for witnessed or suspected elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- 11. Grantee will communicate and collaborate regularly with DAS to help provide logistical and operational support to the program, to provide quality services to tenants, and to strategize program direction and services provision.

VII. Service Objectives

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

- Grantee will have individual and group service encounters with at least 65% of unduplicated tenants per month.
- Grantee will provide tenants with a minimum of two (2) activities or events per week (or 104 annually). Types of activities annually must be at least 10% trainings/workshops, 25% health- and wellness-related, and 65% all other.
- All (100%) of households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will provide services to 100% of unduplicated tenants annually. Services can be individual services, community activities, and/or outreach.

VIII. Outcome Objectives

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

- Tenants will feel connected to and involved with their tenant/resident community. At least 50% of unduplicated residents participating in the annual survey will feel "strongly" or "very strongly" about being connected to and involved with their tenant/resident community.
 - Grantee will use the following standardized question: How strongly do you feel connected to and involved with the tenant/resident community at [site]? The options to answer should be "very strongly," "strongly," "somewhat," and "not at all."
- Tenants will have better access to resources improving their health and wellness. At least 50% of unduplicated tenants participating in the annual survey will "agree" or "highly agree" that they have better access to resources that improve their health and wellness.
 - Grantee will use the following standardized question: Do you have better access to resources that increase your health and wellness? The options to answer should be "highly agree," "agree," "neutral," "disagree," and "highly disagree."
- Tenants will have stable housing. At least 95% of households will have obtained and/or maintained reliable, secure, and stable housing that meets the needs of individuals and households.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers into the grantee's database, using a DAS|OCP-approved intake form.

- 2. Annual and monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
 - a. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VIII (Outcome Objectives). This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th day of the month following the end of the program year.
 - i. Number and percentage of unduplicated tenants to whom services were provided annually.
 - ii. Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "strongly" or "very strongly" when asked about being connected to and involved with their tenant/resident community.
 - iii. Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "agree" or "highly agree" when asked about having better access to resources that improve their health and wellness.
 - iv. Number and percentage of households that have obtained and/or maintained stable housing.
 - b. Grantee will provide a monthly report of activities, referencing the tasks as described in Section VII (Service Objectives). Grantee will enter the monthly metrics in the CARBON database by the 15th day of the following month.
 - i. Number and percentage of unduplicated tenants with individual and group service encounters.
 - ii. Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
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- 4. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and a Security Awareness Training on an annual basis. The Grantee will maintain evidence of staff completion of these trainings.
- 5. Grantee will issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The Grantee must submit the report in CARBON.
- 6. Grantee will develop and deliver ad hoc reports as requested by SF-HSA, DAS, and

6 of 8

OCP.

- 7. Grantee will develop and deliver a bi-annual summary report of SOGI data collected as required by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10 (June-December data) and July 10 (January-June data).
- 8. Grantee will maintain an updated site chart, using the DAS|OCP approved form, with details about the program.
- 9. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable, and will take all reasonable efforts to implement HIPAA requirements.
- 10. Grantee will develop a grievance policy consistent with DAS|OCP policy memorandum.

For assistance with reporting requirements or submission of reports, contact:

Rocio Duenas Rocio.Duenas@sfgov.org Principal Contract Manager, Office of Contract Management Human Services Agency

or

Rosemarie Tocchini Rosemarie.Tocchini@sfgov.org Program Analyst, Office of Community Partnerships Department of Disability and Aging Services

X. Monitoring Activities

A. <u>Program Monitoring</u>: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates; backup documentation for the units of service and all reporting; progress of service and outcome objectives; the methods by which participant records are collected and maintained; reporting performance; maintenance of service unit logs; agency and organization standards, including a current organizational chart and evidence of provision of annual training to staff in Elder Abuse Prevention and Reporting and Security Awareness; review of program operation, including a review of a written policies-and-procedures manual of all OCP-funded programs; written project income polices if applicable; grievance procedure (must be posted in the center/office and distributed to those consumers who are homebound); site chart with current hours of operation; a board of director list; whether services are provided appropriately according to sections VII (Service Objectives) and VIII (Outcome Objectives); logs of service units based on hours of scheduled activities; sign-in sheets of consumers participating in each activity; and documentation showing the reported units of service are based on scheduled activities at the site.

B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, the quarterly balance sheet, the 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 the Personnel Manual, the Emergency Operations Plan, compliance with the Americans with Disabilities Act, subcontracts, MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

				Ap	pendix B, Page 1
					nt Date: 5/16/2024
HUN	IAN SERVICES AG	ENCY CONTRA BY PROGRAM	ACT BUDGET SU	MMARY	
Grantee Name:	Grant Term:				
Chinatown Community Development Center	July 1, 2024 - June 30, 2028				
(Check One) New <u>x</u> Renewal				,	
If modification, Effective Date of Mod.	No. of Mod.				
Program: RAD Senior & Disabled/Chinatov					
Budget Reference Page No.(s)					TOTAL
Program Term	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 Expenditures					
Salaries & Benefits	\$51,986	\$54,065	\$56,228	\$58,477	\$220,756
Operating Expense	\$3,418	\$3,001	\$1,980	\$895	\$9,293
Capital Expenditure				1	\$0
Subtotal	\$55,404	\$57,066	\$58,208	\$59,372	\$230,050
Indirect Percentage (%) (max. 15%)	15%	15%	15%	15%	15%
Indirect Cost (Line 16 X Line 17)	\$8,311	\$8,560	\$8,731	\$8,906	\$34,507
Total DAS Expenditures	\$63,715	\$65,626	\$66,939	\$68,278	\$264,558
Developer Match Expenditures	• • • • • • • • • •	• / / • • • • •			··-·
Salaries & Benefits	\$113,637	\$113,637	\$113,637	\$113,637	\$454,547
Operating Expense	\$24,200	\$24,200	\$24,200	\$24,200	\$96,800
Capital Expenditure Subtotal	\$0 \$137,837	\$0 \$137,837	\$0 \$137,837	\$0 \$137,837	\$0 \$551,347
Indirect Percentage (%)					
Indirect Cost (Line 16 X Line 17)	15% \$20,676	15% \$20,676	15% \$20,675	15% \$20,676	15% \$82,702
Total Developer Expenditures	\$158,512	\$158,512	\$158,512	\$158,512	\$634,049
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Total DAS and Developer Expenditures	\$222,227	\$224,138	\$225,451	\$226,790	\$898,606
DAS Revenues		· ·		· · ·	i
Local General Fund	\$63,715	\$65,626	\$66.939	\$68,278	\$264,558
				* 7 -	· · · · ·
TOTAL DAS REVENUES	\$63,715	\$65,626	\$66,939	\$68,278	\$264,558
Developer Revenues	çoo,i i o	÷30,020	÷30,000	<i> </i>	÷=01,000
Developer Match Funds	\$158,512	\$158,512	\$158,512	\$158,512	\$634,049
	+ +				
Total Developer Revenues	\$158,512	\$158,512	\$158,512	\$158,512	\$634,049
Total Revenues	\$222,227	\$224,138	\$225,451	\$226,790	\$898,606
Full Time Equivalent (FTE)					· ·
Prepared by: Wai Ching Kwan	_	Telephone No. 415-	984-1459		Date: 3/4/2024
HSA-CO Review Signature:		,	-		
-					
HSA #1					

Grantee Name:

Program Name:

Appendix B, Page 2 Document Date: 5/16/2024

Salaries & Benefits Detail

Chinatown Community Development Center RAD Senior & Disabled/Chinatown (227 Bay Street)

DAS SALARIES & BENEFITS 7/1/24-6/30/25 7/1/25-6/30/26 7/1/26-6/30/27 7/1/27-6/30/28 TOTAL Budgeted Salary Budgeted Salary Budgeted Salary Budgeted Salary Annual Full Time POSITION TITLE Salary for FTE FTE SALARIES FTE SALARIES FTE SALARIES FTE SALARIES 7/1/24-6/30/28 RS Supervisor & Program Associate \$80,990 0.01 \$810 0.01 \$842 0.01 \$876 0.01 \$911 \$3,439 Sr Resident Services Coordinator \$70,499 0.55 \$38,774 0.55 \$40,325 0.55 \$41,938 0.55 \$43,616 \$164,654 0.56 0.56 \$41,168 0.56 0.56 TOTALS \$151,489 \$39,584 \$42,814 \$44,527 \$168,093 31% EMPLOYEE FRINGE BENEFITS 31% \$12,402 31% \$12,898 \$13,414 31% \$13,950 \$52,663 \$51.986 \$54.065 \$58.477 TOTAL DAS SALARIES & BENEFITS \$56.228 \$220,756 DEVELOPER MATCH POSITION TITLE Sr. Resident Services Coordinator \$70,499 0.45 \$31,724 0.45 \$32,993 0.45 \$34,313 0.45 \$35,686 \$134,717 \$72,532 0.40 \$29,013 \$30,173 0.40 \$32,635 Intensive Case Manager 0.40 \$31,380 0.40 \$123,202 RS Supervisor & Program Associate \$80,990 0.10 \$8,099 0.10 \$8,423 0.10 \$8,760 0.10 \$9,110 \$34,392 RS Manager \$94,100 0.01 \$941 0.01 \$979 0.01 \$1,018 0.00 \$0 \$2,937 Associate Director of RS \$132,396 0.05 \$6,620 0.05 \$6,885 0.05 \$6,804 0.03 \$4,674 \$24,983 0.03 0.02 0.00 Director of RS \$139,040 \$4,171 \$2,986 \$0 0.00 \$0 \$7,157 Clinical Director \$131,047 0.03 \$3,931 0.03 \$4,089 0.03 \$4,252 0.03 \$4,422 \$16,695 \$202,800 0.01 0.00 0.00 0.00 \$2,028 Deputy Director \$2,028 \$0 \$0 \$0 TOTALS \$923,404 1.08 \$86,528 1.06 \$86,528 1.04 \$86,527 1.01 \$86,528 \$346,111 0.3133 \$27,109 0.3133 \$27,109 0.3133 \$27,109 0.3133 \$27,109 EMPLOYEE FRINGE BENEFITS \$108,436 TOTAL DEVELOPER SALARIES & BENEFITS \$113,637 \$113,637 \$113,637 \$113,637 \$454,547 TOTAL SALARIES & BENEFITS 1.64 \$165,623 1.621 \$167,702 1.598 \$169,864 1.571 \$172,114 \$675,303 HSA #2

				Docur	Appendix B, Page 3 ment Date: 5/16/2024
Grantee Name: Program Name:		inity Development Ce bled/Chinatown (227			
	Operat	ing Expense Deta	il		
DAS EXPENDITURE CATEGORY TERM	7/1/24-6/30/25	7/1/25-6/30/26	7/1/26-6/30/27	7/1/27-6/30/28	TOTAL 7/1/24-6/30/28
Rental of Property					
Utilities(Elec, Water, Gas, Garbage)					
Telecommunications (internet, telephone, cell)	\$500	\$500	\$500	\$100	\$1,600
Office Supplies, Postage	\$200	\$200	\$200	\$50	\$65
Building Maintenance and Repair		<u>.</u>	<u>.</u>	<u>.</u>	`
Printing and Reproduction					
Insurance					
Staff Training					
Staff Travel (Local & Out of Town)	\$50	\$50	\$50	\$50	\$200
Rental of Equipment					
CONSULTANTS					
Consultant A					
OTHER					
Tenant Activities	\$2,668	\$2,251	\$1,230	\$695	\$6,843
TOTAL DAS OPERATING EXPENSE	\$3,418	\$3,001	\$1,980	\$895	\$9,29
DEVELOPER MATCH OPERATING EXPENSE					
Job Recruitment	\$200	\$200	\$200	\$200	\$800
Rental of Property	\$1,200	\$1,200	\$1,200	\$1,200	\$4,80
Utilities(Elec, Water, Gas, Garbage)	\$200	\$200	\$200	\$200	\$80
Telecommunications (internet, telephone, cell)	\$2,000	\$2,000	\$2,000	\$2,000	\$8,000
Office Supplies, Postage	\$2,000	\$2,000	\$2,000	\$2,000	\$8,00
Building Maintenance and Repair	\$400	\$400	\$400	\$400	\$1,60
Printing and Reproduction	\$200	\$200	\$200	\$200	\$80
Insurance	\$100	\$100	\$100	\$100	\$40
Staff Training	\$800	\$800	\$800	\$800	\$3,20
Staff Travel (Local & Out of Town)	\$800	\$800	\$800	\$800	\$3,20
Rental of Equipment	\$200	\$200	\$200	\$200	\$80
Consultant	\$200	\$200	\$200	\$200	\$80
Tenant Activities	\$12,000	\$12,000	\$12,000	\$12,000	\$48,00
Translation Services	\$500	\$500	\$500	\$500	\$2,00
Computer Subscriptions	\$400	\$400	\$400	\$400	\$1,60
Computer supplies & equipment	\$2,000	\$2,000	\$2,000	\$2,000	\$8,000
Meeting Expenses	\$800	\$800	\$800	\$800	\$3,200
Honorarium	\$200	\$200	\$200	\$200	\$800
TOTAL DEVELOPER OPERATING EXPENSE	\$24,200	\$24,200	\$24,200	\$24,200	\$96,800
TOTAL OPERATING EXPENSE	\$27,618	\$27,201	\$26,180	\$25,095	\$106,093
	_	_	_	_	

Appendix A – Services to be Provided Chinatown Community Development Center RAD Housing Support Services at 990 Pacific Avenue July 1, 2024 through June 30, 2028

I. Purpose

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of this grant is to provide support services to older adults and adults with disabilities residing in San Francisco RAD converted housing development units, and to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

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Adult with a	A person 18 to 59 years of age living with a disability
Disability	
At Risk of	To be considered at risk of institutionalization, a person must have, at a
Institutionalization	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	Human Services Agency's Contracts Administration Reporting and Billing
	Online (CARBON) system
City	City and County of San Francisco, a municipal corporation
Communities of Color	An inclusive and unifying term for persons who do not identify as White,
	who have been historically and systemically disadvantaged by
	institutionalized and interpersonal racism.
DAS	Department of Disability and Aging Services
Disability	A condition, or combination of conditions, 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	Chinatown Community Development Center
Health and Wellness	Any service that supports and/or promotes tenants' health and well-being
Services	(i.e. Adult Day Health, nutrition programs, free health screenings, DAS
	services, etc.).
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

II. Definitions

	assigned at birth. This includes, but is not limited to, lesbian, gay, bisexual,
	transgender, genderqueer, and gender nonbinary.
Limited English-	Any person who does not speak English well or is otherwise unable to
Speaking Proficiency	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, as 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.
MOHCD	Mayor's Office of Housing and Community Development
OCM	Office of Contract Management, San Francisco Human Services Agency
OCP	Office of Community Partnerships, Department of Disability and Aging
	Services
Older Adult	Person who is 60 years or older, used interchangeably with "senior."
RAD	Rental Assistance Demonstration
Senior	Person who is 60 years or older, used interchangeably with "older adult."
SF-HSA	Human Services Agency of the City and County of San Francisco.
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
	contractors that provide health care and social services to seek to collect and
	analyze data concerning the sexual orientation and gender identity of the
	clients they serve (Chapter 104, Sections 104.1 through 104.9).

III. Target Population

This program is designed to serve all ethnicities and populations in Grantee's RAD converted housing units, with focused expertise to promote the unique cultural needs which have been identified as demonstrating the greatest economic and social need:

- Persons with low income
- Persons who are socially isolated
- Persons with limited English-speaking proficiency
- Persons from communities of color
- Persons who identify as LGBTQ+
- Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be:

- An older adult, aged 60 years or over or
- An adult with a disability, aged 18-59 and
- Residing in housing units at the locations indicated below

V. Location and Time of Services

Services will be provided at 990 Pacific Avenue, San Francisco, CA, 94133, Monday through Friday, during regular office hours of 9 a.m. to 5:30 p.m., excluding holidays. On occasion, workshops or events will be provided after hours or on weekends.

VI. Description of Services and Program Requirements

- 1. Grantee will provide four categories of services to older adults and adults with disabilities under this grant:
 - i. Outreach
 - a. Establish and maintain positive relationships with tenants.
 - b. Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.
 - c. Contact all new tenants to invite them to join community activities.
 - d. Contact, interact, inform, and invite all tenants to make use of support services to assist with and address individual needs or issues. These efforts will include a variety of outreach techniques such as written messages in appropriate languages, flyers, brochures, telephone calls, open-house events, and emails (as available).
 - ii. Service Connection
 - a. Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
 - b. Provide service needs assessment, information and referral, crisis intervention, and counseling with individuals and groups of tenants, as needed.
 - c. Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
 - d. Provide short-term case management services to tenants as needed, while working to connect those with longer-term needs to ongoing case management services.
 - e. Serve as a liaison or advocate for tenants with other service providers.
 - f. Assist tenants in identifying and accessing community services needed to meet tenant's specific needs or to make progress toward identified goals.
 - iii. Housing Stability
 - a. Work cooperatively and as part of a team with property management staff to meet the needs of tenants.

- b. Conduct direct outreach to all tenants who become delinquent in rent payments, and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- c. Conduct direct outreach to all tenants who are experiencing safety concerns or lease/house rule violations, or who have been involved in critical incidents.
- d. Provide information on various topics that will help tenants maintain their housing; provide assistance in communicating with, responding to, and meeting with property management to help tenancies resolve issues related to housing; provide assistance in the remedy of incidences and/or lease violations that could lead to eviction by establishing written plans; and/or provide assistance with conflict resolution for tenants who need to solve problems or resolve conflicts with other tenants.
- iv. Community Engagement
 - a. Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.
 - b. Provide tenants with opportunities to participate in organized gatherings for peer support, social connections, celebrations/commemorations, and other community events held onsite.
 - c. Provide trainings and educational workshops on a variety of topics relating to health, wellness, finance, housing, and other topics.
- 2. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS|OCP policy memoranda.
- 3. Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.
- 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS|OCP. Grantee will share the survey results with DAS|OCP by March 15th each grant year, or on a mutually agreed-upon date between DAS|OCP and Grantee.
- 5. Grantee will hire, train, and supervise .69 (leveraged and/or grant-funded) to provide services.
- 6. Grantee will ensure adequate and culturally-competent staffing to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all program standards. Grantee will ensure services are available in the languages of the tenant population being served.
- 7. Grantee will ensure that units of service provided are tracked and distinguishable.
- 8. Grantee will attend in-service trainings and meetings coordinated and provided by DAS|OCP, and share the information with their staff and volunteers as needed. Grantee will attend RAD-related, MOHCD, and other meetings as needed.
- 9. Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- 10. Grantee is a mandated reporter for witnessed or suspected elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- 11. Grantee will communicate and collaborate regularly with DAS to help provide logistical and operational support to the program, to provide quality services to tenants, and to strategize program direction and services provision.

VII. Service Objectives

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

- Grantee will have individual and group service encounters with at least 65% of unduplicated tenants per month.
- Grantee will provide tenants with a minimum of two (2) activities or events per week (or 104 annually). Types of activities annually must be at least 10% trainings/workshops, 25% health- and wellness-related, and 65% all other.
- All (100%) of households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will provide services to 100% of unduplicated tenants annually. Services can be individual services, community activities, and/or outreach.

VIII. Outcome Objectives

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

- Tenants will feel connected to and involved with their tenant/resident community. At least 50% of unduplicated residents participating in the annual survey will feel "strongly" or "very strongly" about being connected to and involved with their tenant/resident community.
 - Grantee will use the following standardized question: How strongly do you feel connected to and involved with the tenant/resident community at [site]? The options to answer should be "very strongly," "strongly," "somewhat," and "not at all."
- Tenants will have better access to resources improving their health and wellness. At least 50% of unduplicated tenants participating in the annual survey will "agree" or "highly agree" that they have better access to resources that improve their health and wellness.
 - Grantee will use the following standardized question: Do you have better access to resources that increase your health and wellness? The options to answer should be "highly agree," "agree," "neutral," "disagree," and "highly disagree."
- Tenants will have stable housing. At least 95% of households will have obtained and/or maintained reliable, secure, and stable housing that meets the needs of individuals and households.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers into the grantee's

database, using a DAS|OCP-approved intake form.

- 2. Annual and monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
 - a. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VIII (Outcome Objectives). This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th day of the month following the end of the program year.
 - i. Number and percentage of unduplicated tenants to whom services were provided annually.
 - ii. Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "strongly" or "very strongly" when asked about being connected to and involved with their tenant/resident community.
 - iii. Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "agree" or "highly agree" when asked about having better access to resources that improve their health and wellness.
 - iv. Number and percentage of households that have obtained and/or maintained stable housing.
 - b. Grantee will provide a monthly report of activities, referencing the tasks as described in Section VII (Service Objectives). Grantee will enter the monthly metrics in the CARBON database by the 15th day of the following month.
 - i. Number and percentage of unduplicated tenants with individual and group service encounters.
 - ii. Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - iii. Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- 3. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed-upon date between DAS|OCP and the Grantee.
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For assistance with reporting requirements or submission of reports, contact:

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or

Rosemarie Tocchini Rosemarie.Tocchini@sfgov.org Program Analyst, Office of Community Partnerships Department of Disability and Aging Services

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B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, the quarterly balance sheet, the 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 the Personnel Manual, the Emergency Operations Plan, compliance with the Americans with Disabilities Act, subcontracts, MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

					pendix B, Page 1
HUI	IAN SERVICES AG		CT BUDGET SU		nt Date: 5/16/2024
	I	BY PROGRAM			
Grantee Name:			Grant Term:		
Chinatown Community Development Center	er		July 1, 2024 - June 3	0, 2028	
(Check One) New _x_ Renewal	Modification		-		
If modification, Effective Date of Mod.	No. of Mod.				
Program: RAD Senior & Disabled/Chinatov	vn (990 Pacific Avenue	e)			
Budget Reference Page No.(s)					TOTAL
Program Term	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 Expenditures					
Salaries & Benefits	\$60,344	\$62,758	. ,	\$67,235	\$255,606
Operating Expense	\$14,182	\$14,004	\$13,029	\$12,628	\$53,843
Capital Expenditure	Ф Т А БОО	MTG 700	ФТО ОО Т	¢70.000	\$0
Subtotal Indirect Percentage (%) (max. 15%)	\$74,526	\$76,762	\$78,297	\$79,863	\$309,449
9	15%	15%	15%	15%	15%
Indirect Cost (Line 16 X Line 17)	\$11,179	\$11,514	\$11,745	\$11,979	\$46,417
Total DAS Expenditures	\$85,705	\$88,276	\$90,042	\$91,843	\$355,866
Developer Match Expenditures	• •	• •	• •	• · · = · · · =	
Salaries & Benefits	\$177,917	\$177,917	\$177,917	\$177,917	\$711,668
Operating Expense	\$43,513	\$43,513	\$43,513	\$43,513	\$174,054
Capital Expenditure Subtotal	\$0 \$221,430	\$0 \$221 421	\$0 \$221,431	\$0 \$221,430	\$0 \$885,722
Indirect Percentage (%)		\$221,431			
	15%	15%	15%	15%	15%
Indirect Cost (Line 16 X Line 17)	\$33,215	\$33,215	\$33,215	\$33,215	\$132,858
Total Developer Expenditures	\$254,645	\$254,645	\$254,645	\$254,645	\$1,018,580
Total DAS and Developer Expenditures	\$340,350	\$342,922	\$344,687	\$346,488	\$1,374,447
DAS Revenues	\$040,000	<i>\\</i> 0 <i>\\</i> 2,022	φ044,001	\$040,400	ψ1,014,441
Local General Fund	\$85,705	\$88,276	\$90,042	\$91,843	\$355,866
	\$65,705	ΦΟΟ,270	\$90,042	\$91,043	\$333,000
TOTAL DAS REVENUES	\$85,705	\$88,276	\$90,042	\$91,843	\$355,866
Developer Revenues Developer Match Funds	\$254,645	\$254,645	\$254,645	\$254,645	\$1,018,580
Total Developer Revenues	\$254,645	\$254,645	\$254,645	\$254,645	\$1,018,580
Total Revenues	\$340,350	\$342,922	\$344,687	\$346,488	\$1,374,447
Full Time Equivalent (FTE)					
Prepared by: Wai Ching Kwan		Telephone No. 415-	984-1459	[Date: 3/4/2024
HSA-CO Review Signature:					
HSA #1					
13A #1					

Appendix B, Page 2 Document Date: 5/16/2024

Grantee Name:
Program Name:
Program Name:

Chinatown Community Development Center RAD Senior & Disabled/Chinatown (990 Pacific Avenue)

Salaries & Benefits Detail

DAS SALARIES & BENEFITS			4-6/30/25		5-6/30/26		6-6/30/27	7/1/27-6/30/28		
	Annual Full Time	Budge	ted Salary	Budge	eted Salary	Budge	ted Salary	Budget	ed Salary	TOTAL
POSITION TITLE	Salary for FTE (with 4% annual increase)	FTE	SALARIES	FTE	SALARIES	FTE	SALARIES	FTE	SALARIES	7/1/24-6/30/28
RS Supervisor & Program Associate	\$80,990	0.14	\$11,339	0.14	\$11,792	0.14	\$12,264	0.14	\$12,264	\$47,659
Resident Services Coordinator	\$62,927	0.55	\$34,610	0.55	\$35,995	0.55	\$37,434	0.55	\$38,932	\$146,971
TOTALS	\$143,918	0.69	\$45,949	0.69	\$47,787	0.69	\$49,698	0.69	\$51,196	\$194,629
EMPLOYEE FRINGE BENEFITS	[31%	\$14,396	31%	\$14,972	31%	\$15,570	31%	\$16,040	\$60,977
TOTAL DAS SALARIES & BENEFITS	[\$60,344		\$62,758		\$65,269		\$67,235	\$255,606
DEVELOPER MATCH POSITION TITLE										
Resident Services Coordinator	\$62,927	0.45	\$28,317	0.45	\$29,450	0.45	\$30,628	0.45	\$31,853	\$120,249
Intensive Case Manager	\$72,532	0.60	\$43,519	0.60	\$45,260	0.60	\$47,070	0.60	\$48,953	\$184,803
RS Supervisor & Program Associate	\$80,990	0.35	\$28,347	0.35	\$29,480	0.35	\$30,660	0.35	\$31,886	\$120,373
RS Manager	\$94,100	0.04	\$3,764	0.04	\$3,915	0.04	\$4,071	0.03	\$3,302	\$15,052
Associate Director of RS	\$132,396	0.08	\$10,592	0.06	\$7,706	0.04	\$5,728	0.03	\$4,468	\$28,494
Director of RS	\$139,040	0.07	\$9,733	0.07	\$10,122	0.05	\$7,394	0.03	\$4,692	\$31,941
Clinical Director	\$131,047	0.07	\$9,173	0.07	\$9,540	0.07	\$9,922	0.07	\$10,319	\$38,954
Deputy Director	\$202,800	0.01	\$2,028	0.00	\$0	0.00	\$0	0.00	\$0	\$2,028
TOTALS	\$915,833	1.67	\$135,473	1.64	\$135,474	1.60	\$135,473	1.56	\$135,473	\$541,893
EMPLOYEE FRINGE BENEFITS	[31%	\$42,444	31%	\$42,444	31%	\$42,444	31%	\$42,444	\$169,775
TOTAL DEVELOPER SALARIES & BENEFITS			\$177,917		\$177,917		\$177,917		\$177,917	\$711,668
TOTAL SALARIES & BENEFITS	l	2.36	\$238,261	2.326	\$240,676	2.289	\$243,186	2.251	\$245,152	\$967,275
HSA #2										

Appendix B, Page 3 Document Date: 5/16/2024 Grantee Name: **Chinatown Community Development Center** Program Name: RAD Senior & Disabled/Chinatown (990 Pacific Avenue) **Operating Expense Detail** TOTAL DAS EXPENDITURE CATEGORY TERM 7/1/24-6/30/25 7/1/25-6/30/26 7/1/24-6/30/28 7/1/26-6/30/27 7/1/27-6/30/28 Rental of Property Utilities(Elec, Water, Gas, Garbage) Telecommunications (internet, telephone, cell) \$1,500 \$1,500 \$6,000 \$1,500 \$1,500 \$1,666 Office Supplies, Postage \$417 \$417 \$417 \$417 Building Maintenance and Repair Printing and Reproduction Insurance Staff Training Staff Travel (Local & Out of Town) \$150 \$150 \$150 \$150 \$600 Rental of Equipment \$100 \$100 **Computer Subscriptions** \$115 \$100 \$415 CONSULTANTS Consultant A <u>OTHER</u> Tenant Activities \$45,161 \$12,000 \$11,837 \$10,862 \$10.462 TOTAL DAS OPERATING EXPENSE \$14,004 \$13,029 \$12,628 \$53,843 \$14,182 DEVELOPER MATCH OPERATING EXPENSE \$1,600 Job Recruitment \$400 \$400 \$400 \$400 Rental of Property \$3,600 \$3,600 \$3,600 \$3,600 \$14,400 Utilities(Elec, Water, Gas, Garbage) \$400 \$400 \$400 \$400 \$1,600 \$12,800 Telecommunications (internet, telephone, cell) \$3,200 \$3,200 \$3,200 \$3,200 Office Supplies, Postage \$3,783 \$15,134 \$3,783 \$3,783 \$3,783 Building Maintenance and Repair \$800 \$800 \$800 \$800 \$3,200 \$1,600 Printing and Reproduction \$400 \$400 \$400 \$400 Insurance \$200 \$800 \$200 \$200 \$200 \$1,200 \$1,200 \$1,200 \$1,200 \$4,800 Staff Training \$1,000 Staff Travel (Local & Out of Town) \$1,000 \$1,000 \$1,000 \$4,000 Rental of Equipment \$1,600 \$400 \$400 \$400 \$400 \$3,200 Consultant \$800 \$800 \$800 \$800 Tenant Activities \$19,530 \$19,530 \$19,530 \$19,530 \$78,120 Translation Services \$1,000 \$1,000 \$4,000 \$1,000 \$1,000 Computer Subscriptions \$800 \$800 \$800 \$800 \$3,200 Computer supplies & equipment \$4,000 \$4,000 \$4,000 \$4,000 \$16,000 Meeting Expenses \$1,600 \$1,600 \$1,600 \$1,600 \$6,400 Honorarium \$400 \$400 \$400 \$400 \$1,600 TOTAL DEVELOPER OPERATING EXPENSE \$43,513.44 \$43,513 \$43,513 \$43,513 \$174,054 TOTAL OPERATING EXPENSE \$56,542 \$56,142 \$227,896 \$57,695.27 \$57,517 HSA #3

	APPENDIX F - SITE CHART					
Human Services Agency, Department of Disability and Aging Services, Office of Community Partnerships						
Date: 3/4/2024		Fiscal Year: 2024-2028				
Agency: Chinatown Community Deve	*					
Contract Mailing Address: 615 Grant	Avenue, San Francisco, CA 94108					
Director: Malcolm Yeung		Phone Number : 415-984-1456				
-	atown - 227 Bay Street & 990 Pacific Avenue					
Program Supervisor: Yinyin Zhu		Phone Number: 415-984-1471				
<u>SITES:</u> Name of Site	227 Bay Street	990 Pacific Avenue				
Address and Zip	227 Bay Street, 94133	990 Pacific Avenue, 94133				
Phone Number	415-913-7067	(415)818-4807				
Fax Number	415-814-3637	None				
Neighborhood	Chinatown /North Beach	Chinatown				
Supervisorial District No.	D-3	D-3				
Bus Line #	8, 45, 30, Central Subway - Rose Pak-Chinatown Station 12, 45, 30, Central Subway - Rose Pak Station					
Person in Charge	Yinyin Zhu	Yinyin Zhu				
Site Manager/Coordinator	Connie Kwan	Ellie Xu				
Additional Programs Offered at Site	Tai Chi from Self-Help for the Elderly, Groceries 4 Seniors bi-weekly food distribution	Tai Chi from Self-Help for the Elderly, Groceries 4 Seniors bi-weekly food distribution				
	<u>X</u> Mon X Tues X Wed	X_Mon X_Tues X_Wed				
Business Days	X Thurs X Fri	X_Thurs X_Fri				
	SatSun	SatSun				
Business Hours	9AM to 5:30PM	9AM to 5:30PM				
Hours of Scheduled Programming (for DAS - Funded Programs)	Business Hours and occasional evenings.	Business Hours and occasional evenings.				
Total number of Service Days in FY	244	244				
Number of Service Days Closed	16	16				
Days Closed (list holidays closed)New Years Day, Martin Luther King, Jr Day, Lunar New Year, Presidents' Day, Cesar Chavez Day, Memorial Day, Juneteenth, Independence Day, Labor Day, Indigenous Peoples' Day, Veterans Day, Thanksgiving Day, Day after Thanksgiving, Christmas Eve, Christmas Day, New Year's EveNew Years Day, Martin Luther King New Years Day, Martin Luther King New Year, Presidents' Day, Cesar Chavez Day, Memorial Day, Juneteenth, Independence Day, Labor Day, Indigenous Peoples' Day, Veterans Day, Thanksgiving Day, Day after Thanksgiving, Christmas Eve, Christmas Day, New Year's EveNew Years Day, Martin Luther King New Years Day, Memorial Day, Juneteenth, Independ Labor Day, Indigenous Peoples' Day, Day, Thanksgiving Day, Day after Thanksgiving, Christmas Eve, Christmas Day, New Year's EveNew Years Day, Martin Luther King New Year, Presidents' Day, Cesar Chavez Day, Memorial Day, Juneteenth, Independ Labor Day, Indigenous Peoples' Day, 						
ADA Accessible	X Yes No	X Yes No				

Appendix A – Services to be Provided HomeRise RAD Housing Support Services at 1750 McAllister Street July 1, 2024 through June 30, 2028

I. Purpose

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of this grant is to provide support services to older adults and adults with disabilities residing in San Francisco RAD converted housing development units, and to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

Adult with a	A person 18 to 59 years of age living with a disability
Disability	
At Risk of	To be considered at risk of institutionalization, a person must have, at a
Institutionalization	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	Human Services Agency's Contracts Administration Reporting and Billing
	Online (CARBON) system
City	City and County of San Francisco, a municipal corporation
Communities of Color	An inclusive and unifying term for persons who do not identify as White,
	who have been historically and systemically disadvantaged by
	institutionalized and interpersonal racism.
DAS	Department of Disability and Aging Services
Disability	A condition, or combination of conditions, 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	HomeRise
Health and Wellness	Any service that supports and/or promotes tenants' health and well-being
Services	(i.e. Adult Day Health, nutrition programs, free health screenings, DAS
	services, etc.).
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

II. Definitions

	assigned at birth. This includes, but is not limited to, lesbian, gay, bisexual,
	transgender, genderqueer, and gender nonbinary.
Limited English-	Any person who does not speak English well or is otherwise unable to
Speaking Proficiency	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, as 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.
MOHCD	Mayor's Office of Housing and Community Development
OCM	Office of Contract Management, San Francisco Human Services Agency
OCP	Office of Community Partnerships, Department of Disability and Aging
	Services
Older Adult	Person who is 60 years or older, used interchangeably with "senior."
RAD	Rental Assistance Demonstration
Senior	Person who is 60 years or older, used interchangeably with "older adult."
SF-HSA	Human Services Agency of the City and County of San Francisco.
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
	contractors that provide health care and social services to seek to collect and
	analyze data concerning the sexual orientation and gender identity of the
	clients they serve (Chapter 104, Sections 104.1 through 104.9).

III. Target Population

This program is designed to serve all ethnicities and populations in Grantee's RAD converted housing units, with focused expertise to promote the unique cultural needs which have been identified as demonstrating the greatest economic and social need:

- Persons with low income
- Persons who are socially isolated
- Persons with limited English-speaking proficiency
- Persons from communities of color
- Persons who identify as LGBTQ+
- Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be:

- An older adult, aged 60 years or over or
- An adult with a disability, aged 18-59 and
- Residing in housing units at the locations indicated below

V. Location and Time of Services

Services will be provided at 1750 McAllister Street, San Francisco, CA, 94115, Monday through Friday, during regular office hours of 9:00 a.m. to 5:00 p.m., excluding holidays. On occasion, workshops or events will be provided after hours or on weekends.

VI. Description of Services and Program Requirements

- 1. Grantee will provide four categories of services to older adults and adults with disabilities under this grant:
 - i. Outreach
 - a. Establish and maintain positive relationships with tenants.
 - b. Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.
 - c. Contact all new tenants to invite them to join community activities.
 - d. Contact, interact, inform, and invite all tenants to make use of support services to assist with and address individual needs or issues. These efforts will include a variety of outreach techniques such as written messages in appropriate languages, flyers, brochures, telephone calls, open-house events, and emails (as available).
 - ii. Service Connection
 - a. Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
 - b. Provide service needs assessment, information and referral, crisis intervention, and counseling with individuals and groups of tenants, as needed.
 - c. Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
 - d. Provide short-term case management services to tenants as needed, while working to connect those with longer-term needs to ongoing case management services.
 - e. Serve as a liaison or advocate for tenants with other service providers.
 - f. Assist tenants in identifying and accessing community services needed to meet tenant's specific needs or to make progress toward identified goals.
 - iii. Housing Stability
 - a. Work cooperatively and as part of a team with property management staff to meet the needs of tenants.

- b. Conduct direct outreach to all tenants who become delinquent in rent payments, and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- c. Conduct direct outreach to all tenants who are experiencing safety concerns or lease/house rule violations, or who have been involved in critical incidents.
- d. Provide information on various topics that will help tenants maintain their housing; provide assistance in communicating with, responding to, and meeting with property management to help tenancies resolve issues related to housing; provide assistance in the remedy of incidences and/or lease violations that could lead to eviction by establishing written plans; and/or provide assistance with conflict resolution for tenants who need to solve problems or resolve conflicts with other tenants.
- iv. Community Engagement
 - a. Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.
 - b. Provide tenants with opportunities to participate in organized gatherings for peer support, social connections, celebrations/commemorations, and other community events held onsite.
 - c. Provide trainings and educational workshops on a variety of topics relating to health, wellness, finance, housing, and other topics.
- 2. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS|OCP policy memoranda.
- 3. Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.
- 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS|OCP. Grantee will share the survey results with DAS|OCP by March 15th each grant year, or on a mutually agreed-upon date between DAS|OCP and Grantee.
- 5. Grantee will hire, train, and supervise .86 FTE (leveraged and/or grant-funded) to provide services.
- 6. Grantee will ensure adequate and culturally-competent staffing to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all program standards. Grantee will ensure services are available in the languages of the tenant population being served.
- 7. Grantee will ensure that units of service provided are tracked and distinguishable.
- 8. Grantee will attend in-service trainings and meetings coordinated and provided by DAS|OCP, and share the information with their staff and volunteers as needed. Grantee will attend RAD-related, MOHCD, and other meetings as needed.
- 9. Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- 10. Grantee is a mandated reporter for witnessed or suspected elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- 11. Grantee will communicate and collaborate regularly with DAS to help provide logistical and operational support to the program, to provide quality services to tenants, and to strategize program direction and services provision.

VII. Service Objectives

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

- Grantee will have individual and group service encounters with at least 65% of unduplicated tenants per month.
- Grantee will provide tenants with a minimum of two (2) activities or events per week (or 104 annually). Types of activities annually must be at least 10% trainings/workshops, 25% health- and wellness-related, and 65% all other.
- All (100%) of households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will provide services to 100% of unduplicated tenants annually. Services can be individual services, community activities, and/or outreach.

VIII. Outcome Objectives

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

- Tenants will feel connected to and involved with their tenant/resident community. At least 50% of unduplicated residents participating in the annual survey will feel "strongly" or "very strongly" about being connected to and involved with their tenant/resident community.
 - Grantee will use the following standardized question: How strongly do you feel connected to and involved with the tenant/resident community at [site]? The options to answer should be "very strongly," "strongly," "somewhat," and "not at all."
- Tenants will have better access to resources improving their health and wellness. At least 50% of unduplicated tenants participating in the annual survey will "agree" or "highly agree" that they have better access to resources that improve their health and wellness.
 - Grantee will use the following standardized question: Do you have better access to resources that increase your health and wellness? The options to answer should be "highly agree," "agree," "neutral," "disagree," and "highly disagree."
- Tenants will have stable housing. At least 95% of households will have obtained and/or maintained reliable, secure, and stable housing that meets the needs of individuals and households.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers into the grantee's

database, using a DAS|OCP-approved intake form.

- 2. Annual and monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
 - a. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VIII (Outcome Objectives). This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th day of the month following the end of the program year.
 - i. Number and percentage of unduplicated tenants to whom services were provided annually.
 - ii. Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "strongly" or "very strongly" when asked about being connected to and involved with their tenant/resident community.
 - iii. Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "agree" or "highly agree" when asked about having better access to resources that improve their health and wellness.
 - iv. Number and percentage of households that have obtained and/or maintained stable housing.
 - b. Grantee will provide a monthly report of activities, referencing the tasks as described in Section VII (Service Objectives). Grantee will enter the monthly metrics in the CARBON database by the 15th day of the following month.
 - i. Number and percentage of unduplicated tenants with individual and group service encounters.
 - ii. Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - iii. Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- 3. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed-upon date between DAS|OCP and the Grantee.
- 4. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and a Security Awareness Training on an annual basis. The Grantee will maintain evidence of staff completion of these trainings.
- 5. Grantee will issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The Grantee must submit the report in CARBON.

- 6. Grantee will develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
- 7. Grantee will develop and deliver a bi-annual summary report of SOGI data collected as required by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10 (June-December data) and July 10 (January-June data).
- 8. Grantee will maintain an updated site chart, using the DAS|OCP approved form, with details about the program.
- 9. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable, and will take all reasonable efforts to implement HIPAA requirements.
- 10. Grantee will develop a grievance policy consistent with DAS|OCP policy memorandum.

For assistance with reporting requirements or submission of reports, contact:

Rocio Duenas Rocio.Duenas@sfgov.org Principal Contract Manager, Office of Contract Management Human Services Agency

or

Rosemarie Tocchini Rosemarie.Tocchini@sfgov.org Program Analyst, Office of Community Partnerships Department of Disability and Aging Services

X. Monitoring Activities

A. <u>Program Monitoring</u>: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates; backup documentation for the units of service and all reporting; progress of service and outcome objectives; the methods by which participant records are collected and maintained; reporting performance; maintenance of service unit logs; agency and organization standards, including a current organizational chart and evidence of provision of annual training to staff in Elder Abuse Prevention and Reporting and Security Awareness; review of program operation, including a review of a written policies-and-procedures manual of all OCP-funded programs; written project income polices if applicable; grievance procedure (must be posted in the center/office and distributed to those consumers who are homebound); site chart with current hours of operation; a board of director list; whether services are provided appropriately according to sections VII (Service Objectives) and VIII (Outcome Objectives); logs of service units based on hours of scheduled activities; sign-in sheets of consumers participating in each activity; and documentation showing the reported units of service are based on scheduled activities at the site.

B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, the quarterly balance sheet, the 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 the Personnel Manual, the Emergency Operations Plan, compliance with the Americans with Disabilities Act, subcontracts, MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

Program Term 71/124-6/30/25 71/125-6/30/26 71/126-6/30/27 71/127-6/30/28 71/124-6/ DAS Expenditures \$74,682 \$76,922 \$78,461 \$80,030 \$3 Operating Expense \$0					Ар	pendix B, Page 1
Homerise (Formerly Community Housing Partnership) July 1, 2024 - June 30, 2028 (Check One) New X_ Renewal Modification If modification, Effective Date of Mod. No. of Mod. Program: Program: Rental Assistance Demonstration - 1750 McAllister TOTA Budget Reference Page No.(s) 171/26-6/30/26 71/126-6/30/27 71/127-6/30/28 71/126-6/30/27 DAS Exponditures 30 50 90 30 30 Statines & Benefits \$74,682 \$76,922 \$78,461 \$80,030 53 Indirect Percentage (%) (max. 15%) 15%, 15% 15% 15% 15% Indirect Percentage (%) (max. 15%) 15%, 15/38 \$11,769 \$12,005 \$ Statiate & Benefits \$13,637 \$15,074 \$13,533 \$13,431 \$ Operating Expenditures \$86,046 \$60,23 \$60,00 \$2 \$2 \$60,60 \$2 \$2 \$60,60 \$2 \$2 \$11,538 \$11,769 \$12,005 \$ \$10 \$10 \$2 \$20,600 \$2 \$2 \$24,641 <td< th=""><th>HUM</th><th></th><th></th><th>CT BUDGET SU</th><th>MMARY</th><th></th></td<>	HUM			CT BUDGET SU	MMARY	
Check One) New X Renewal Modification If modification, Effective Date of Mod. No. of Mod. TOTA Program: Program: Rental Assistance Demonstration - 1750 McAllister TOTA Budget Reference Page No.(s) T/1/24-6/30/25 7/1/26-6/30/27 T/1/27-6/30/28 7/1/27-6/30/28 T/1/24-6/30/25 Salaries & Benefits \$74,662 \$76,922 \$78,461 \$80,030 \$33 Operating Expenditures \$0	Grantee Name:			Grant Term:		
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DAS Revenues \$85,884 \$88,461 \$90,230 \$92,035 \$33 Local General Fund \$85,884 \$88,461 \$90,230 \$92,035 \$33 Local General Fund Image: Constraint of the second	Total Developer Expenditures	\$85,884	\$88,461	\$90,230	\$92,035	\$356,610
Local General Fund \$85,884 \$88,861 \$90,230 \$92,035 \$33 Image: Constraint of the state of the st	Total DAS and Developer Expenditures	\$171,768	\$176,922	\$180,460	\$184,070	\$713,220
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Developer Revenues \$85,884 \$88,461 \$90,230 \$92,035 \$3 Developer Match Funds \$85,884 \$88,461 \$90,230 \$92,035 \$3 Image: Constraint of the second	TOTAL DAS REVENUES	\$85.884	\$88,461	\$90,230	\$92,035	\$356,610
Developer Match Funds \$85,884 \$88,461 \$90,230 \$92,035 \$3 Image: Constraint of the second						. ,
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Bal. \$0 \$0 \$0 \$0 \$0 Full Time Equivalent (FTE) Image: Compared by: Karen Erickson Telephone No. 415.225.4959 Date: 5/23	Total Developer Revenues	\$85,884	\$88,461	\$90,230	\$92,035	\$356,610
Full Time Equivalent (FTE) Telephone No. 415.225.4959 Date: 5/23	Total Revenues	\$171,768	\$176,922	\$180,460	\$184,070	\$713,220
Prepared by: Karen Erickson Telephone No. 415.225.4959 Date: 5/23	Bal.	\$0	\$0	\$0	\$0	
	Full Time Equivalent (FTE)					
HSA-CO Review Signature:	Prepared by: Karen Erickson		Telephone No. 415.	225.4959		Date: 5/23/2024
	HSA-CO Review Signature:					
HSA #1	HSA #1					

Grantee Name: Homerise (Formerly Community Housing Partnership) Program Name: Rental Assistance Demonstration - 1750 McAllister Salaries & Benefits Detail DAS SALARIES & BENEFITS 7/1/24-6/30/25 7/1/25-6/30/26 7/1/26-6/30/27 7/1/27-6/30/28 Budgeted Salary Budgeted Salary Budgeted Salary TOTAL Budgeted Salary Annual Full Time SALARIES SALARIES 7/1/24-6/30/28 POSITION TITLE FTE FTE SALARÍES FTE SALARIES FTE Residential Services Team Lead \$67.716 0.63 \$55.962 0.80 \$58,203 0.86 \$59.742 0.86 \$61,311 \$179,256 \$0 TOTALS \$237,216 0.63 \$55,962 0.800 \$58,203 0.858 \$59,742 0.858 \$61,311 \$235,218 33% \$18,719 33% \$18,719 33% \$18,719 33% \$18,719 EMPLOYEE FRINGE BENEFITS \$74,878 **TOTAL DAS SALARIES & BENEFITS** \$74,682 \$76,922 \$78,461 \$80,030 \$310,096 DEVELOPER MATCH POSITION TITLE Residential Services Team Lead \$67,716 0.370 \$13,637 0.200 \$15,074 0.140 \$13,535 0.140 \$13,431 \$55,677 TOTALS \$67,716 0.370 \$13,637 0.200 \$15,074 0.140 \$13,535 0.140 \$13,431 \$55,677 EMPLOYEE FRINGE BENEFITS 33% \$4,562 33% \$5,042 33% \$4,527 33% \$4,493 \$18,624 TOTAL DEVELOPER SALARIES & BENEFITS \$18,199 \$20,116 \$18,062 \$17,924 \$74,301 TOTAL SALARIES & BENEFITS 1.000 \$92,880 1.000 \$97,039 0.998 \$96,524 0.998 \$97,954 \$384,397 HSA #2

Appendix B, Page 2

Appendix B, Page 3

Grantee Name: Homerise (Formerly Community Housing Partnership) Program Name: Rental Assistance Demonstration - 1750 McAllister

Operating Expense Detail

DAS EXPENDITURE CATEGORY	TERM	7/1/24-6/30/25	7/1/25-6/30/26	7/1/26-6/30/27	7/1/27-6/30/28	TOTAL 7/1/24-6/30/28
Rental of Property						
Utilities(Elec, Water, Gas, Phone, Garbage)						
Office Supplies, Postage						
Building Maintenance and Repair						
Printing and Reproduction						
Insurance						
Staff Training						
Staff Travel (Local & Out of Town)						
Rental of Equipment						
CONSULTANTS						
Consultant A						
Consultant B						
Consultant C						
OTHER						
TOTAL DAS OPERATING EXPENSE	-	\$0	\$0	 \$0_	\$0	\$0
DEVELOPER MATCH OPERATING EXPEN	SE					
Rental of Property		\$1,200	\$1,200	\$1,200	\$1,200	\$4,800
Utilities(Elec, Water, Gas, Phone, Garbage)		\$1,000	\$1,000	\$1,000	\$1,000	\$4,000
Office Supplies, Postage		\$870	\$874	\$875	\$830	\$3,449
Building Maintenance and Repair		\$4,200	\$5,000	\$5,000	\$5,000	\$19,200
Printing and Reproduction		\$736	\$735	\$811	\$730	\$3,012
Insurance		\$500	\$500	\$500	\$500	\$2,000
Staff Training		\$500	\$500	\$500	\$500	\$2,000
Staff Travel (Local & Out of Town)		\$200	\$200	\$200	\$200	\$800
Rental of Equipment		\$1,840	\$1,840	\$1,840	\$1,840	\$7,358
Tenant Activities		\$50,000	\$50,000	\$53,000	\$54,800	\$207,800
TOTAL DEVELOPER OPERATING EXPENS	SE	\$61,045	\$61,849	\$64,926	\$66,600	\$254,419
TOTAL OPERATING EXPENSE		\$61,045	\$61,849	\$64,926	\$66,600	\$254,419
HSA #3						

Appendix A – Services to be Provided HomeRise RAD Housing Support Services at 666 Ellis Street July 1, 2024 through June 30, 2028

I. Purpose

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of this grant is to provide support services to older adults and adults with disabilities residing in San Francisco RAD converted housing development units, and to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

Adult with a	A person 18 to 59 years of age living with a disability
Disability	
At Risk of	To be considered at risk of institutionalization, a person must have, at a
Institutionalization	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	Human Services Agency's Contracts Administration Reporting and Billing
	Online (CARBON) system
City	City and County of San Francisco, a municipal corporation
Communities of Color	An inclusive and unifying term for persons who do not identify as White,
	who have been historically and systemically disadvantaged by
	institutionalized and interpersonal racism.
DAS	Department of Disability and Aging Services
Disability	A condition, or combination of conditions, 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	HomeRise
Health and Wellness	Any service that supports and/or promotes tenants' health and well-being
Services	(i.e. Adult Day Health, nutrition programs, free health screenings, DAS
	services, etc.).
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,

II. Definitions

	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, as 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.
MOHCD	Mayor's Office of Housing and Community Development
OCM	Office of Contract Management, San Francisco Human Services Agency
OCP	Office of Community Partnerships, Department of Disability and Aging Services
Older Adult	Person who is 60 years or older, used interchangeably with "senior."
RAD	Rental Assistance Demonstration
Senior	Person who is 60 years or older, used interchangeably with "older adult."
SF-HSA	Human Services Agency of the City and County of San Francisco.
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 contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9).

III. Target Population

This program is designed to serve all ethnicities and populations in Grantee's RAD converted housing units, with focused expertise to promote the unique cultural needs which have been identified as demonstrating the greatest economic and social need:

- Persons with low income
- Persons who are socially isolated
- Persons with limited English-speaking proficiency
- Persons from communities of color
- Persons who identify as LGBTQ+
- Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be:

- An older adult, aged 60 years or over or
- An adult with a disability, aged 18-59 and
- Residing in housing units at the locations indicated below
- V. Location and Time of Services

Services will be provided at 666 Ellis Street, San Francisco, CA, 94109, Monday through Friday, during regular office hours of 9 a.m. to 5:00 p.m., excluding holidays. On occasion, workshops or events will be provided after hours or on weekends.

VI. Description of Services and Program Requirements

- 1. Grantee will provide four categories of services to older adults and adults with disabilities under this grant:
 - i. Outreach
 - a. Establish and maintain positive relationships with tenants.
 - b. Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.
 - c. Contact all new tenants to invite them to join community activities.
 - d. Contact, interact, inform, and invite all tenants to make use of support services to assist with and address individual needs or issues. These efforts will include a variety of outreach techniques such as written messages in appropriate languages, flyers, brochures, telephone calls, open-house events, and emails (as available).
 - ii. Service Connection
 - a. Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
 - b. Provide service needs assessment, information and referral, crisis intervention, and counseling with individuals and groups of tenants, as needed.
 - c. Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
 - d. Provide short-term case management services to tenants as needed, while working to connect those with longer-term needs to ongoing case management services.
 - e. Serve as a liaison or advocate for tenants with other service providers.
 - f. Assist tenants in identifying and accessing community services needed to meet tenant's specific needs or to make progress toward identified goals.
 - iii. Housing Stability
 - a. Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
 - b. Conduct direct outreach to all tenants who become delinquent in rent

payments, and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.

- c. Conduct direct outreach to all tenants who are experiencing safety concerns or lease/house rule violations, or who have been involved in critical incidents.
- d. Provide information on various topics that will help tenants maintain their housing; provide assistance in communicating with, responding to, and meeting with property management to help tenancies resolve issues related to housing; provide assistance in the remedy of incidences and/or lease violations that could lead to eviction by establishing written plans; and/or provide assistance with conflict resolution for tenants who need to solve problems or resolve conflicts with other tenants.
- iv. Community Engagement
 - a. Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.
 - b. Provide tenants with opportunities to participate in organized gatherings for peer support, social connections, celebrations/commemorations, and other community events held onsite.
 - c. Provide trainings and educational workshops on a variety of topics relating to health, wellness, finance, housing, and other topics.
- 2. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS|OCP policy memoranda.
- 3. Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.
- 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS|OCP. Grantee will share the survey results with DAS|OCP by March 15th each grant year, or on a mutually agreed-upon date between DAS|OCP and Grantee.
- 5. Grantee will hire, train, and supervise .87 FTE (leveraged and/or grant-funded) to provide services.
- 6. Grantee will ensure adequate and culturally-competent staffing to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all program standards. Grantee will ensure services are available in the languages of the tenant population being served.
- 7. Grantee will ensure that units of service provided are tracked and distinguishable.
- 8. Grantee will attend in-service trainings and meetings coordinated and provided by DAS|OCP, and share the information with their staff and volunteers as needed. Grantee will attend RAD-related, MOHCD, and other meetings as needed.
- 9. Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- 10. Grantee is a mandated reporter for witnessed or suspected elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- 11. Grantee will communicate and collaborate regularly with DAS to help provide logistical and operational support to the program, to provide quality services to tenants, and to strategize program direction and services provision.

VII. Service Objectives

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

- Grantee will have individual and group service encounters with at least 65% of unduplicated tenants per month.
- Grantee will provide tenants with a minimum of two (2) activities or events per week (or 104 annually). Types of activities annually must be at least 10% trainings/workshops, 25% health- and wellness-related, and 65% all other.
- All (100%) of households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will provide services to 100% of unduplicated tenants annually. Services can be individual services, community activities, and/or outreach.

VIII. Outcome Objectives

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

- Tenants will feel connected to and involved with their tenant/resident community. At least 50% of unduplicated residents participating in the annual survey will feel "strongly" or "very strongly" about being connected to and involved with their tenant/resident community.
 - Grantee will use the following standardized question: How strongly do you feel connected to and involved with the tenant/resident community at [site]? The options to answer should be "very strongly," "strongly," "somewhat," and "not at all."
- Tenants will have better access to resources improving their health and wellness. At least 50% of unduplicated tenants participating in the annual survey will "agree" or "highly agree" that they have better access to resources that improve their health and wellness.
 - Grantee will use the following standardized question: Do you have better access to resources that increase your health and wellness? The options to answer should be "highly agree," "agree," "neutral," "disagree," and "highly disagree."
- Tenants will have stable housing. At least 95% of households will have obtained and/or maintained reliable, secure, and stable housing that meets the needs of individuals and households.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers into the grantee's database, using a DAS|OCP-approved intake form.

- 2. Annual and monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
 - a. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VIII (Outcome Objectives). This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th day of the month following the end of the program year.
 - i. Number and percentage of unduplicated tenants to whom services were provided annually.
 - ii. Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "strongly" or "very strongly" when asked about being connected to and involved with their tenant/resident community.
 - iii. Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "agree" or "highly agree" when asked about having better access to resources that improve their health and wellness.
 - iv. Number and percentage of households that have obtained and/or maintained stable housing.
 - b. Grantee will provide a monthly report of activities, referencing the tasks as described in Section VII (Service Objectives). Grantee will enter the monthly metrics in the CARBON database by the 15th day of the following month.
 - i. Number and percentage of unduplicated tenants with individual and group service encounters.
 - ii. Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - iii. Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- 3. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed-upon date between DAS|OCP and the Grantee.
- 4. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and a Security Awareness Training on an annual basis. The Grantee will maintain evidence of staff completion of these trainings.
- 5. Grantee will issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The Grantee must submit the report in CARBON.
- 6. Grantee will develop and deliver ad hoc reports as requested by SF-HSA, DAS, and

6 of 8

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- 7. Grantee will develop and deliver a bi-annual summary report of SOGI data collected as required by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10 (June-December data) and July 10 (January-June data).
- 8. Grantee will maintain an updated site chart, using the DAS|OCP approved form, with details about the program.
- 9. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable, and will take all reasonable efforts to implement HIPAA requirements.
- 10. Grantee will develop a grievance policy consistent with DAS|OCP policy memorandum.

For assistance with reporting requirements or submission of reports, contact:

Rocio Duenas Rocio.Duenas@sfgov.org Principal Contract Manager, Office of Contract Management Human Services Agency

or

Rosemarie Tocchini Rosemarie.Tocchini@sfgov.org Program Analyst, Office of Community Partnerships Department of Disability and Aging Services

X. Monitoring Activities

A. <u>Program Monitoring</u>: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates; backup documentation for the units of service and all reporting; progress of service and outcome objectives; the methods by which participant records are collected and maintained; reporting performance; maintenance of service unit logs; agency and organization standards, including a current organizational chart and evidence of provision of annual training to staff in Elder Abuse Prevention and Reporting and Security Awareness; review of program operation, including a review of a written policies-and-procedures manual of all OCP-funded programs; written project income polices if applicable; grievance procedure (must be posted in the center/office and distributed to those consumers who are homebound); site chart with current hours of operation; a board of director list; whether services are provided appropriately according to sections VII (Service Objectives) and VIII (Outcome Objectives); logs of service units based on hours of scheduled activities; sign-in sheets of consumers participating in each activity; and documentation showing the reported units of service are based on scheduled activities at the site.

B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, the quarterly balance sheet, the 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 the Personnel Manual, the Emergency Operations Plan, compliance with the Americans with Disabilities Act, subcontracts, MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

HUM	IAN SERVICES AG	ENCY CONTRA	CT BUDGET SU	MMARY	
Grantee Name:	Grant Term:				
Homerise (Formerly Community Housing I	July 1, 2024 - June 3	30 2028			
(Check One) New X_ Renewal				50, 2020	
If modification, Effective Date of Mod.	No. of Mod.				
Program: Rental Assistance Demonstration	on - 666 Ellis				
Budget Reference Page No.(s)					TOTAL
Program Term	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 Expenditures					
Salaries & Benefits	\$75,535	\$77,801	\$79,356	\$80,944	\$313,637
Operating Expense	\$0	\$0	\$0	\$0	\$C
Capital Expenditure Subtotal	\$75,535	\$77,801	\$79,356	\$80,944	\$313,637
Indirect Percentage (%) (max. 15%)		. ,			ψυτυ,θυτ
Indirect Cost (Line 16 X Line 17)	15% \$11.330	15% \$11.670	15% \$11,903	15% \$12.142	\$47,045
Total DAS Expenditures	\$86,865	\$89,471	\$91,260	\$93,086	\$360,682
Developer Match Expenditures	<i>400,000</i>	<i>v</i> oo, i	<i>vo</i> ., 200	<i>400,000</i>	+++++++++++++++++++++++++++++++++++++++
Salaries & Benefits	\$17.675	\$17,949	\$18,432	\$18.799	\$72,856
Operating Expense	\$57,943	\$59,876	\$60,980	\$62,202	\$241,000
Capital Expenditure	\$0	\$0	\$0	\$0 \$0	\$C
Subtotal	\$75,619	\$77,825	\$79,412	\$81,001	\$313,856
Indirect Percentage (%)	15%	15%	15%	15%	
Indirect Cost (Line 16 X Line 17)	\$10,678	\$10,999	\$11,219	\$11,443	\$44,339
Total Developer Expenditures	\$86,297	\$88,824	\$90,631	\$92,444	\$358,195
Total DAS and Developer Expenditures	\$173,162	\$178,295	\$181,891	\$185,529	\$718,877
DAS Revenues		, ,			
Local General Fund	\$86.865	\$89,471	\$91,260	\$93,086	\$360.682
TOTAL DAS REVENUES	\$86,865	\$89,471	\$91,260	\$93,086	\$360,682
Developer Revenues Developer Match Funds	\$86,297	\$88,824	\$90,631	\$92,444	\$358,195
Total Developer Revenues	\$86,297	\$88,824	\$90,631	\$92,444	\$358,195
Total Revenues	\$173,162	\$178,295	\$181,891	\$93,086	\$718,87
Full Time Equivalent (FTE)	0.64	0.79	0.85	0.85	
Prepared by: Karen Erickson		Telephone No. 415.	225.4959		Date: 5/21/2024
HSA-CO Review Signature: HSA #1					

Appendix B, Page 2

Grantee Name: Homerise (Formerly Community Housing Partnership) Program Name: Rental Assistance Demonstration - 666 Ellis

			Salaries & E	Benefits	Detail					
DAS SALARIES & BENEFITS		7/1/24-6/30/25		7/1/25-6/30/26		7/1/26-6/30/27		7/1/27-6/30/28		
POSITION TITLE	Annual Full Time	Budge FTE	ted Salary SALARIES	Budge FTE	eted Salary SALARIES	Budge FTE	ted Salary SALARIES	Budget FTE	ed Salary SALARIES	TOTAL 7/1/24-6/30/28
Resident Services Team Lead	\$67,716	0.64	\$56,602	0.79	\$58,300	0.85	\$59,465	0.85	\$60,655	\$235,022
TOTALS	\$67,716	0.643	\$56,602	0.792	\$58,300	0.850	\$59,465	0.850	\$60,655	\$235,022
TOTALS	\$07,710	0.043	\$30,002	0.792	\$36,300	0.850	\$39,403	0.650	\$00,0 <u>0</u> 5	\$233,022
EMPLOYEE FRINGE BENEFITS	[33%	\$18,933	33%	\$19,501	33%	\$19,891	33%	\$20,289	\$78,615
TOTAL DAS SALARIES & BENEFITS	[\$75,535		\$77,801		\$79,356		\$80,944	\$313,637
DEVELOPER MATCH POSITION TITLE	1									
Resident Services Team Lead	\$67,716	0.357	\$13,245	0.208	\$13,450	0.150	\$13,812	0.150	\$14,087	\$54,594
TOTALS	\$67,716	0.357	\$13,245	0.208	\$13,450	0.150	\$13,812	0.150	\$14,087	\$54,594
EMPLOYEE FRINGE BENEFITS	٦	33%	\$4,430	33%	\$4,499	33%	\$4,620	33%	\$4,712	¢19.262
	L	33%	Φ 4,430	33%		33%	φ 4,020	33%	φ 4 ,/ IZ	\$18,262
TOTAL DEVELOPER SALARIES & BENEFITS	ŀ		\$17,675		\$17,949		\$18,432		\$18,799	\$72,856
TOTAL SALARIES & BENEFITS	Į	1.000	\$93,211	1.000	\$95,750	1.000	\$97,788	1.000	\$99,743	\$386,492
HSA #2										

Appendix B, Page 3

Grantee Name: Homerise (Formerly Community Housing Partnership) Program Name: Rental Assistance Demonstration - 666 Ellis

Operating Expense Detail

DAS EXPENDITURE CATEGORY	TERM	7/1/24-6/30/25	7/1/25-6/30/26	7/1/26-6/30/27	7/1/27-6/30/28	TOTAL 7/1/24-6/30/28
Rental of Property						
Utilities(Elec, Water, Gas, Phone, Garbage)						
Office Supplies, Postage						
Building Maintenance and Repair						
Printing and Reproduction						
Insurance						
Staff Training						
Staff Travel (Local & Out of Town)						
Rental of Equipment						
Tenant Activities						
<u>CONSULTANTS</u>						
Consultant A						
Consultant B						
Consultant C						
OTHER	-					
TOTAL DAS OPERATING EXPENSE		\$0	\$0	\$0	\$0	\$0
DEVELOPER MATCH OPERATING EXPEN	SE					
Rental of Property		\$1,152	\$1,200	\$1,200	\$1,200	\$4,752
Utilities(Elec, Water, Gas, Phone, Garbage)		\$1,537	\$1,540	\$1,537	\$1,537	\$6,150
Office Supplies, Postage		\$870	\$920	\$835	\$837	\$3,462
Building Maintenance and Repair		\$5,000	\$6,319	\$4,300	\$3,500	\$19,119
Printing and Reproduction		\$745	\$745	\$739	\$689	\$2,918
Insurance		\$500	\$500	\$500	\$500	\$2,000
Staff Training		\$500	\$600	\$650	\$500	\$2,250
Staff Travel (Local & Out of Town)		\$200	\$200	\$200	\$200	\$800
Rental of Equipment		\$1,840	\$1,852	\$1,840	\$1,840	\$7,371
		\$45,600	\$46,000	\$49,180	\$51,400	
TOTAL DEVELOPER OPERATING EXPENS	SE	\$57,943	\$59,876	\$60,980	\$62,202	\$241,000
TOTAL OPERATING EXPENSE		\$57,943	\$59,876	\$60,980	\$62,202	\$241,000
HSA #3			_	_	_	

APPENDIX F - SITE CHART

Human Services Agency, Department of Disability and Aging Services, Office of Community Partnerships

Date: 3/12/2024

ADA Accessible

Agency: HomeRise

Contract Mailing Address: HomeRise 251 Post St. Suite 200 San Francisco, CA 94104

XXX YES

NO

XXX YES No

Director: Interim Director of Housing Operations; David Basile

Program: Resident services

Program Manager: Interim Director of Resident Services; Marcel Davis

Phone Number:

<u>SITES:</u> <u>Name of Site</u>	RTA 1750 McAllister	666 Ellis			
Address and Zip		666 Ellis St. San Francisco, CA 94109			
Phone Number	414-962-1600	415-200-0550			
Fax Number					
Neighborhood	North Park Area	Tenderloin			
Supervisorial District No.	District 5	District 5			
Bus Line #	5 5R 22	27 Bryant Bus Line			
Person in Charge	Director of Housing Operations	Director Of Housing Operations			
Site Manager/Coordinator	Bridgette Moore	Karen Martinez			
Additional Programs Offered at Site	Counseling, Community Building, vocations, Financial planing	counseling, community building, vocations, financial planning			
Business Days	<u>Mon Tues Wed</u> <u>Thurs Fri</u> <u>Sat Sun</u>	<u>Mon Tues Weds</u> <u>Thurs Fri</u> <u>Sat Sun</u>	<u>Mon Tues Wed</u> <u>Thurs Fri</u> <u>Sat Sun</u>	<u>Mon Tues Wed</u> <u>Thurs Fri</u> <u>Sat Sun</u>	<u>Mon Tues Wed</u> <u>Thurs Fri</u> <u>Sat Sun</u>
Business Hours	9am to 5pm M-F	9am to 5pm M-F			
Hours of Scheduled Programming (for DAS - Funded Programs)	Varies	Varies			
Total number of Service Days in FY	250	250			
Number of Service Days Closed	12	12			
Days Closed (list holidays closed)	New Years,MLK, President Day, Memorial Day, Juneteeth, 4th of July, Labor Day, Columbus Day,, Veterans Day, Thanksgiving, Christmas EVE, Christmas Day	New Years,MLK, President Day, Memorial Day, Juneteeth, 4th of July, Labor Day, Columbus Day,, Veterans Day, Thanksgiving, Christmas EVE, Christmas Day			

Yes

No

Yes

No

Yes

No

Fiscal Year: 23/24

Phone Number:

Appendix A – Services to be Provided Mercy Housing RAD Housing Support Services at 1760 Bush Street July 1, 2024 through June 30, 2028

I. Purpose

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of this grant is to provide support services to older adults and adults with disabilities residing in San Francisco RAD converted housing development units, and to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

Adult with a	A person 18 to 59 years of age living with a disability
Disability	
At Risk of	To be considered at risk of institutionalization, a person must have, at a
Institutionalization	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	Human Services Agency's Contracts Administration Reporting and Billing
	Online (CARBON) system
City	City and County of San Francisco, a municipal corporation
Communities of Color	An inclusive and unifying term for persons who do not identify as White,
	who have been historically and systemically disadvantaged by
	institutionalized and interpersonal racism.
DAS	Department of Disability and Aging Services
Disability	A condition, or combination of conditions, 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	Mercy Housing
Health and Wellness	Any service that supports and/or promotes tenants' health and well-being
Services	(i.e. Adult Day Health, nutrition programs, free health screenings, DAS
	services, etc.).
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,

II. Definitions

	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, as 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.
MOHCD	Mayor's Office of Housing and Community Development
OCM	Office of Contract Management, San Francisco Human Services Agency
OCP	Office of Community Partnerships, Department of Disability and Aging Services
Older Adult	Person who is 60 years or older, used interchangeably with "senior."
RAD	Rental Assistance Demonstration
Senior	Person who is 60 years or older, used interchangeably with "older adult."
SF-HSA	Human Services Agency of the City and County of San Francisco.
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 contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9).

III. Target Population

This program is designed to serve all ethnicities and populations in Grantee's RAD converted housing units, with focused expertise to promote the unique cultural needs which have been identified as demonstrating the greatest economic and social need:

- Persons with low income
- Persons who are socially isolated
- Persons with limited English-speaking proficiency
- Persons from communities of color
- Persons who identify as LGBTQ+
- Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be:

- An older adult, aged 60 years or over or
- An adult with a disability, aged 18-59 and
- Residing in housing units at the locations indicated below
- V. Location and Time of Services

Services will be provided at 1760 Bush Street, San Francisco, CA, 94109, Monday through Friday, during regular office hours of 8:30 a.m. to 5:30 p.m., excluding holidays. On occasion, workshops or events will be provided after hours or on weekends.

VI. Description of Services and Program Requirements

- 1. Grantee will provide four categories of services to older adults and adults with disabilities under this grant:
 - i. Outreach
 - a. Establish and maintain positive relationships with tenants.
 - b. Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.
 - c. Contact all new tenants to invite them to join community activities.
 - d. Contact, interact, inform, and invite all tenants to make use of support services to assist with and address individual needs or issues. These efforts will include a variety of outreach techniques such as written messages in appropriate languages, flyers, brochures, telephone calls, open-house events, and emails (as available).
 - ii. Service Connection
 - a. Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
 - b. Provide service needs assessment, information and referral, crisis intervention, and counseling with individuals and groups of tenants, as needed.
 - c. Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
 - d. Provide short-term case management services to tenants as needed, while working to connect those with longer-term needs to ongoing case management services.
 - e. Serve as a liaison or advocate for tenants with other service providers.
 - f. Assist tenants in identifying and accessing community services needed to meet tenant's specific needs or to make progress toward identified goals.
 - iii. Housing Stability
 - a. Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
 - b. Conduct direct outreach to all tenants who become delinquent in rent

payments, and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.

- c. Conduct direct outreach to all tenants who are experiencing safety concerns or lease/house rule violations, or who have been involved in critical incidents.
- d. Provide information on various topics that will help tenants maintain their housing; provide assistance in communicating with, responding to, and meeting with property management to help tenancies resolve issues related to housing; provide assistance in the remedy of incidences and/or lease violations that could lead to eviction by establishing written plans; and/or provide assistance with conflict resolution for tenants who need to solve problems or resolve conflicts with other tenants.
- iv. Community Engagement
 - a. Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.
 - b. Provide tenants with opportunities to participate in organized gatherings for peer support, social connections, celebrations/commemorations, and other community events held onsite.
 - c. Provide trainings and educational workshops on a variety of topics relating to health, wellness, finance, housing, and other topics.
- 2. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS|OCP policy memoranda.
- 3. Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.
- 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS|OCP. Grantee will share the survey results with DAS|OCP by March 15th each grant year, or on a mutually agreed-upon date between DAS|OCP and Grantee.
- 5. Grantee will hire, train, and supervise .69 FTE (leveraged and/or grant-funded) to provide services.
- 6. Grantee will ensure adequate and culturally-competent staffing to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all program standards. Grantee will ensure services are available in the languages of the tenant population being served.
- 7. Grantee will ensure that units of service provided are tracked and distinguishable.
- 8. Grantee will attend in-service trainings and meetings coordinated and provided by DAS|OCP, and share the information with their staff and volunteers as needed. Grantee will attend RAD-related, MOHCD, and other meetings as needed.
- 9. Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- 10. Grantee is a mandated reporter for witnessed or suspected elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- 11. Grantee will communicate and collaborate regularly with DAS to help provide logistical and operational support to the program, to provide quality services to tenants, and to strategize program direction and services provision.

VII. Service Objectives

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

- Grantee will have individual and group service encounters with at least 65% of unduplicated tenants per month.
- Grantee will provide tenants with a minimum of two (2) activities or events per week (or 104 annually). Types of activities annually must be at least 10% trainings/workshops, 25% health- and wellness-related, and 65% all other.
- All (100%) of households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will provide services to 100% of unduplicated tenants annually. Services can be individual services, community activities, and/or outreach.

VIII. Outcome Objectives

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

- Tenants will feel connected to and involved with their tenant/resident community. At least 50% of unduplicated residents participating in the annual survey will feel "strongly" or "very strongly" about being connected to and involved with their tenant/resident community.
 - Grantee will use the following standardized question: How strongly do you feel connected to and involved with the tenant/resident community at [site]? The options to answer should be "very strongly," "strongly," "somewhat," and "not at all."
- Tenants will have better access to resources improving their health and wellness. At least 50% of unduplicated tenants participating in the annual survey will "agree" or "highly agree" that they have better access to resources that improve their health and wellness.
 - Grantee will use the following standardized question: Do you have better access to resources that increase your health and wellness? The options to answer should be "highly agree," "agree," "neutral," "disagree," and "highly disagree."
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 - i. Number and percentage of unduplicated tenants to whom services were provided annually.
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 - iv. Number and percentage of households that have obtained and/or maintained stable housing.
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 - iii. Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- 3. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed-upon date between DAS|OCP and the Grantee.
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- 10. Grantee will develop a grievance policy consistent with DAS|OCP policy memorandum.

For assistance with reporting requirements or submission of reports, contact:

Rocio Duenas Rocio.Duenas@sfgov.org Principal Contract Manager, Office of Contract Management Human Services Agency

or

Rosemarie Tocchini Rosemarie.Tocchini@sfgov.org Program Analyst, Office of Community Partnerships Department of Disability and Aging Services

X. Monitoring Activities

A. <u>Program Monitoring</u>: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates; backup documentation for the units of service and all reporting; progress of service and outcome objectives; the methods by which participant records are collected and maintained; reporting performance; maintenance of service unit logs; agency and organization standards, including a current organizational chart and evidence of provision of annual training to staff in Elder Abuse Prevention and Reporting and Security Awareness; review of program operation, including a review of a written policies-and-procedures manual of all OCP-funded programs; written project income polices if applicable; grievance procedure (must be posted in the center/office and distributed to those consumers who are homebound); site chart with current hours of operation; a board of director list; whether services are provided appropriately according to sections VII (Service Objectives) and VIII (Outcome Objectives); logs of service units based on hours of scheduled activities; sign-in sheets of consumers participating in each activity; and documentation showing the reported units of service are based on scheduled activities at the site.

B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, the quarterly balance sheet, the 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 the Personnel Manual, the Emergency Operations Plan, compliance with the Americans with Disabilities Act, subcontracts, MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	В	С	D	E	F
1					Ар	pendix B, Page 1
2					Docume	ent Date: 5/22/202
3	HUM	AN SERVICES AG	ENCY CONTRA	ACT BUDGET SU	IMMARY	
4		I	BY PROGRAM			
5	Grantee Name:			Grant Term:		
				-		
6	Mercy Housing Californi			July 1, 2024 - June 3	30, 2028	
7	(Check One) New <u>X</u> Renewal	Modification				
8	If modification, Effective Date of Mod.	No. of Mod.				
q	Program: 1760 Bush (RAD Seniors)					
	Budget Reference Page No.(s)					TOTAL
	Program Term	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
12						
	Salaries & Benefits	\$65,472	\$67,436		\$70,161	\$271,85
	Operating Expense Capital Expenditure	\$34,603	\$35,641	\$36,353	\$37,081	\$143,67 \$
	Subtotal	\$100,075	\$103,077	\$105,138	\$107,242	م \$415,53
-	Indirect Percentage (%) (max. 15%)	1				
••	Indirect Cost (Line 16 X Line 17)	15% \$15,011	15% \$15,462		15% \$16.086	15 \$62,33
	Total DAS Expenditures	\$115,086	\$118,539	\$120,909	\$123,328	\$477,86
20	•	\$110,000	ψ110,000	ψ120,000	ψ120,020	ψ+77,00
-	Salaries & Benefits	\$98,560	\$101,517	\$104,562	\$107,699	\$412,33
	Operating Expense	\$90,500	\$101,517 \$0	\$104,302	\$107,099	\$412,33
	Capital Expenditure	\$0	\$0	\$0	\$0 \$0	\$
	Subtotal	\$98,560	\$101,517	\$104,562	\$107,699	\$412,33
	Indirect Percentage (%)	10%	10%		10%	10
	Indirect Cost (Line 16 X Line 17)	\$9,856	\$10,152	\$10,456	\$10,770	\$41,23
	Total Developer Expenditures	\$108,416	\$111,668	\$115,019	\$118,469	\$453,57
28	· · ·	¢.00,0	<i></i> ,	¢	¢110,100	¢ 100,01
29	Total DAS and Developer Expenditures	\$223,502	\$230,207	\$235,927	\$241,797	\$931,43
30	DAS Revenues	+ - ,	* • • • * •	,,.	· · · ·	,,
31	Local General Fund	\$115,086	\$118,539	\$120,909	\$123,328	\$477,86
32		+ -,	, ,	· · · · · ·	· · · · · ·	, , ,
33						
34						
35						
36 37						
38						
39	TOTAL DAS REVENUES	\$115,086	\$118,539	\$120,909	\$123,328	\$477,86
10	Developer Revenues	\$115,000	\$110,009	\$120,909	φ123,320	φ477,00
+0 41	Developer Match Funds	\$108,416	\$111,668	\$115,019	\$118,469	\$453,57
12		φ100,410	φ111,000	φ110,010	φ110,400	φ+00,07
13						
14						
15	Total Developer Revenues	\$108,416	\$111,668	\$115,019	\$118,469	\$453,57
16	Total Revenues	\$223,502	\$230,207	\$235,927	\$241,797	\$931,43
17	Full Time Equivalent (FTE)					
19	Prepared by:	-	Telephone No.			Date:
					•	
50	HSA-CO Review Signature:					
	HSA #1					

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1	A	В	C	D	E	Г	9	п	I	•	opendix B, Page 2
2										Documer	t Date: 5/22/2024
3 4	Grantee Name: Mercy Housing California										
	Program Name: 1760 Bush										
6											
7				Salaries & E	Benefits	Detail					
8											
	DAS SALARIES & BENEFITS			-6/30/25		5-6/30/26		5-6/30/27		-6/30/28	TOTAL
10		Annual Full Time	Budge	ted Salary	Budge	eted Salary	Budge	ted Salary	Budget	ed Salary	TOTAL
11	POSITION TITLE	Salary for FTE	FTE	SALARIES	FTE	SALARIES	FTE	SALARIES	FTE	SALARIES	7/1/24-6/30/28
12	Resident Services Coordinator II	\$70,000	0.500	\$35,000	0.500	\$36,050	0.500	\$36,771	0.500	\$37,506	\$145,327
13	Resident Services Manager II	\$100,000	0.100	\$10,000	0.100	\$10,300	0.100	\$10,506	0.100	\$10,716	\$41,522
14	Admin/Contract Specialist	\$55,000	0.070	\$3,850	0.070	\$3,966	0.070	\$4,045	0.070	\$4,126	\$15,986
15	Associate Director, Senior Services	\$115,000	0.020	\$2,300	0.020	\$2,369	0.020	\$2,416	0.020	\$2,465	\$9,550
16											
17											
18											
19											
20											
21											
22	TOTALS	\$340,000	0.690	\$51,150	0.690	\$52,685	0.690	\$53,738	0.690	\$54,813	\$212,386
23	TOTALS	\$340,000	0.030	ψ01,100	0.030	ψ02,000	0.030	ψ00,700	0.030	ψ04,010	ψ212,500
24			1								
	EMPLOYEE FRINGE BENEFITS		28%	\$14,322	28%	\$14,752	28%	\$15,047	28%	\$15,348	\$59,468
26 27											
	TOTAL DAS SALARIES & BENEFITS			\$65,472		\$67,436		\$68,785		\$70,161	\$271,854
29				<i>400,412</i>		<i>v01,400</i>		<i>400,100</i>		\$70,101	\$211,004
30	DEVELOPER MATCH POSITION TITLE										
31	Resident Services Coordinator II	\$70,000	0.500	\$35,000	0.500	\$36,050	0.500	\$37,132	0.500	\$38,245	\$146,427
32	Resident Services Coordinator II	\$70,000	0.600	\$42,000	0.600	\$43,260	0.600	\$44,558	0.600	\$45,895	\$175,712
33											
34											
35											
36											
37	TOTALS	\$140,000	1.100	\$77,000	1.100	\$79,310	1.100	\$81,689	1.100	\$84,140	\$322,139
38											
	EMPLOYEE FRINGE BENEFITS		28%	\$21,560	28%	\$22,207	28%	\$22,873	28%	\$23,559	\$90,199
40											
	TOTAL DEVELOPER SALARIES & BENEFITS			\$98,560		\$101,517		\$104,562		\$107,699	\$412,338
	TOTAL SALARIES & BENEFITS		1.790	\$164,032	1.790	\$168,953	1.790	\$173,347	1.790	\$177,860	\$684,192
43											
	HSA #2										

	A	В	С	D	E	F	G	Н	1	J	К	L	М
1					•							Deres	Appendix B, Page 3
2												Docu	ment Date: 5/22/2024
4	Grantee Name: Merc		California										
5 6	Program Name: 1760	0 Bush											
7					Oper	rating I	Expense D	etail	l				
8 9													TOTAL
	DAS EXPENDITURE	CATEGORY	·	TERM	7/1/24-6/30/25	7/	1/25-6/30/26		7/1/26-6/30/27	7	7/1/27-6/30/2	8	7/1/24-6/30/28
11	Rental of Property												
	Utilities(Elec, Water, G	Sas, Phone, (Garbage)										
	Office Supplies, Posta		0,		\$2,000	0	\$2,000		\$2,000		\$2,0	000	\$8,000
	Building Maintenance	-			``````		. ,		. ,		. ,		`, , , , , , , , , , , , , , , , ,
	Printing and Reproduc	-											
	Insurance												
	Staff Training				\$2,000	0	\$2,000)	\$2,000		\$2,0	000	\$8,000
	Staff Travel (Local & C	Dut of Town)			<u></u> \$800		\$800		\$800			300	\$3,200
	Rental of Equipment						<i>\$</i> 500		\$000		ψ		
20													
20	<u>CONSULTANTS</u>												
22	Consultant A												
25	Consultant A												
26	OTHER												
27				-									
28	Supplies for Monthly C Events		rojects &		\$27,803	3	\$28,841	1	\$29,553		\$30,2	281	\$116,478
	Translation			-	\$2,000	0	\$2,000	0	\$2,000		\$2,0	000	\$8,000
31													
	TOTAL DAS OPERAT	TING EXPEN	NSE		\$34,603	3	\$35,641	1	\$36,353		\$37,0	081	\$143,678
33													
34	DEVELOPER MATCH	OPERATIN	IG EXPEN	<u>ISE</u>									
35	Rental of Property												\$0
36	Utilities(Elec, Water, G	Bas, Phone, (Garbage)										\$0
37	Office Supplies, Posta	ge											\$0
38	Building Maintenance	and Repair											\$0
39	Printing and Reproduc	tion											\$0
40	Insurance												\$0
41	Staff Training												\$0
42	Staff Travel (Local & C	Out of Town)											\$0
43	Rental of Equipment												\$0
44													
45	TOTAL DEVELOPER	OPERATING	G EXPEN	SE	\$0	0	\$0	2	\$0			\$0	\$0
46 47	TOTAL OPERATING I	EXPENSE			\$34,603	3	\$35,641	1	\$36,353		\$37,0	081	\$143,678
48							400,04	<u> </u>	÷00,000		ψ07,0		
49	HSA #3												

Appendix A – Services to be Provided Mercy Housing RAD Housing Support Services at 1880 Pine Street July 1, 2024 through June 30, 2028

I. Purpose

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of this grant is to provide support services to older adults and adults with disabilities residing in San Francisco RAD converted housing development units, and to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

Adult with a	A person 18 to 59 years of age living with a disability
Disability	A person 18 to 59 years of age fiving with a disability
At Risk of	To be considered at risk of institutionalization, a person must have, at a
Institutionalization	minimum, one of the following:
montationalization	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
CARRON	personal items, performing housework, using a telephone.
CARBON	Human Services Agency's Contracts Administration Reporting and Billing
City	Online (CARBON) system City and County of San Francisco, a municipal corporation
Communities of Color	An inclusive and unifying term for persons who do not identify as White,
	who have been historically and systemically disadvantaged by institutionalized and interpersonal racism.
DAS	Department of Disability and Aging Services
Disability	A condition, or combination of conditions, 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	Mercy Housing
Health and Wellness	Any service that supports and/or promotes tenants' health and well-being
Services	(i.e. Adult Day Health, nutrition programs, free health screenings, DAS
	services, etc.).
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,

II. Definitions

	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, as 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.
MOHCD	Mayor's Office of Housing and Community Development
OCM	Office of Contract Management, San Francisco Human Services Agency
OCP	Office of Community Partnerships, Department of Disability and Aging Services
Older Adult	Person who is 60 years or older, used interchangeably with "senior."
RAD	Rental Assistance Demonstration
Senior	Person who is 60 years or older, used interchangeably with "older adult."
SF-HSA	Human Services Agency of the City and County of San Francisco.
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 contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9).

III. Target Population

This program is designed to serve all ethnicities and populations in Grantee's RAD converted housing units, with focused expertise to promote the unique cultural needs which have been identified as demonstrating the greatest economic and social need:

- Persons with low income
- Persons who are socially isolated
- Persons with limited English-speaking proficiency
- Persons from communities of color
- Persons who identify as LGBTQ+
- Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be:

- An older adult, aged 60 years or over or
- An adult with a disability, aged 18-59 and
- Residing in housing units at the locations indicated below
- V. Location and Time of Services

Services will be provided at 1880 Pine Street, San Francisco, CA, 94109, Monday through Friday, during regular office hours of 8:30 a.m. to 5:30 p.m., excluding holidays. On occasion, workshops or events will be provided after hours or on weekends.

VI. Description of Services and Program Requirements

- 1. Grantee will provide four categories of services to older adults and adults with disabilities under this grant:
 - i. Outreach
 - a. Establish and maintain positive relationships with tenants.
 - b. Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.
 - c. Contact all new tenants to invite them to join community activities.
 - d. Contact, interact, inform, and invite all tenants to make use of support services to assist with and address individual needs or issues. These efforts will include a variety of outreach techniques such as written messages in appropriate languages, flyers, brochures, telephone calls, open-house events, and emails (as available).
 - ii. Service Connection
 - a. Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
 - b. Provide service needs assessment, information and referral, crisis intervention, and counseling with individuals and groups of tenants, as needed.
 - c. Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
 - d. Provide short-term case management services to tenants as needed, while working to connect those with longer-term needs to ongoing case management services.
 - e. Serve as a liaison or advocate for tenants with other service providers.
 - f. Assist tenants in identifying and accessing community services needed to meet tenant's specific needs or to make progress toward identified goals.
 - iii. Housing Stability
 - a. Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
 - b. Conduct direct outreach to all tenants who become delinquent in rent

payments, and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.

- c. Conduct direct outreach to all tenants who are experiencing safety concerns or lease/house rule violations, or who have been involved in critical incidents.
- d. Provide information on various topics that will help tenants maintain their housing; provide assistance in communicating with, responding to, and meeting with property management to help tenancies resolve issues related to housing; provide assistance in the remedy of incidences and/or lease violations that could lead to eviction by establishing written plans; and/or provide assistance with conflict resolution for tenants who need to solve problems or resolve conflicts with other tenants.
- iv. Community Engagement
 - a. Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.
 - b. Provide tenants with opportunities to participate in organized gatherings for peer support, social connections, celebrations/commemorations, and other community events held onsite.
 - c. Provide trainings and educational workshops on a variety of topics relating to health, wellness, finance, housing, and other topics.
- 2. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS|OCP policy memoranda.
- 3. Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.
- 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS|OCP. Grantee will share the survey results with DAS|OCP by March 15th each grant year, or on a mutually agreed-upon date between DAS|OCP and Grantee.
- 5. Grantee will hire, train, and supervise .69 FTE (leveraged and/or grant-funded) to provide services.
- 6. Grantee will ensure adequate and culturally-competent staffing to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all program standards. Grantee will ensure services are available in the languages of the tenant population being served.
- 7. Grantee will ensure that units of service provided are tracked and distinguishable.
- 8. Grantee will attend in-service trainings and meetings coordinated and provided by DAS|OCP, and share the information with their staff and volunteers as needed. Grantee will attend RAD-related, MOHCD, and other meetings as needed.
- 9. Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- 10. Grantee is a mandated reporter for witnessed or suspected elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- 11. Grantee will communicate and collaborate regularly with DAS to help provide logistical and operational support to the program, to provide quality services to tenants, and to strategize program direction and services provision.

VII. Service Objectives

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

- Grantee will have individual and group service encounters with at least 65% of unduplicated tenants per month.
- Grantee will provide tenants with a minimum of two (2) activities or events per week (or 104 annually). Types of activities annually must be at least 10% trainings/workshops, 25% health- and wellness-related, and 65% all other.
- All (100%) of households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will provide services to 100% of unduplicated tenants annually. Services can be individual services, community activities, and/or outreach.

VIII. Outcome Objectives

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

- Tenants will feel connected to and involved with their tenant/resident community. At least 50% of unduplicated residents participating in the annual survey will feel "strongly" or "very strongly" about being connected to and involved with their tenant/resident community.
 - Grantee will use the following standardized question: How strongly do you feel connected to and involved with the tenant/resident community at [site]? The options to answer should be "very strongly," "strongly," "somewhat," and "not at all."
- Tenants will have better access to resources improving their health and wellness. At least 50% of unduplicated tenants participating in the annual survey will "agree" or "highly agree" that they have better access to resources that improve their health and wellness.
 - Grantee will use the following standardized question: Do you have better access to resources that increase your health and wellness? The options to answer should be "highly agree," "agree," "neutral," "disagree," and "highly disagree."
- Tenants will have stable housing. At least 95% of households will have obtained and/or maintained reliable, secure, and stable housing that meets the needs of individuals and households.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers into the grantee's database, using a DAS|OCP-approved intake form.

- 2. Annual and monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
 - a. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VIII (Outcome Objectives). This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th day of the month following the end of the program year.
 - i. Number and percentage of unduplicated tenants to whom services were provided annually.
 - ii. Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "strongly" or "very strongly" when asked about being connected to and involved with their tenant/resident community.
 - iii. Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "agree" or "highly agree" when asked about having better access to resources that improve their health and wellness.
 - iv. Number and percentage of households that have obtained and/or maintained stable housing.
 - b. Grantee will provide a monthly report of activities, referencing the tasks as described in Section VII (Service Objectives). Grantee will enter the monthly metrics in the CARBON database by the 15th day of the following month.
 - i. Number and percentage of unduplicated tenants with individual and group service encounters.
 - ii. Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - iii. Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- 3. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed-upon date between DAS|OCP and the Grantee.
- 4. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and a Security Awareness Training on an annual basis. The Grantee will maintain evidence of staff completion of these trainings.
- 5. Grantee will issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The Grantee must submit the report in CARBON.
- 6. Grantee will develop and deliver ad hoc reports as requested by SF-HSA, DAS, and

6 of 8

OCP.

- 7. Grantee will develop and deliver a bi-annual summary report of SOGI data collected as required by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10 (June-December data) and July 10 (January-June data).
- 8. Grantee will maintain an updated site chart, using the DAS|OCP approved form, with details about the program.
- 9. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable, and will take all reasonable efforts to implement HIPAA requirements.
- 10. Grantee will develop a grievance policy consistent with DAS|OCP policy memorandum.

For assistance with reporting requirements or submission of reports, contact:

Rocio Duenas Rocio.Duenas@sfgov.org Principal Contract Manager, Office of Contract Management Human Services Agency

or

Rosemarie Tocchini Rosemarie.Tocchini@sfgov.org Program Analyst, Office of Community Partnerships Department of Disability and Aging Services

X. Monitoring Activities

A. <u>Program Monitoring</u>: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates; backup documentation for the units of service and all reporting; progress of service and outcome objectives; the methods by which participant records are collected and maintained; reporting performance; maintenance of service unit logs; agency and organization standards, including a current organizational chart and evidence of provision of annual training to staff in Elder Abuse Prevention and Reporting and Security Awareness; review of program operation, including a review of a written policies-and-procedures manual of all OCP-funded programs; written project income polices if applicable; grievance procedure (must be posted in the center/office and distributed to those consumers who are homebound); site chart with current hours of operation; a board of director list; whether services are provided appropriately according to sections VII (Service Objectives) and VIII (Outcome Objectives); logs of service units based on hours of scheduled activities; sign-in sheets of consumers participating in each activity; and documentation showing the reported units of service are based on scheduled activities at the site.

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Α	В	С	D	E	F
1				Ap	pendix B, Page 1
2				Docum	nent Date: 3/1/202
3 HUI	MAN SERVICES AG		ACT BUDGET SU	MMARY	
4		BY PROGRAM			
5 Grantee Name:			Grant Term:		
5 Grantee Name.			Giant Term.		
6 Mercy Housing Califor	rnia		July 1, 2024 - June 3	80, 2028	
7 (Check One) New X Renewal	Modification				
8 If modification, Effective Date of Mod.	No. of Mod.				
9 Program: 1880 Pine (RAD Seniors)					
10 Budget Reference Page No.(s)					TOTAL
11 Program Term	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
12 DAS Expenditures	//1/24-0/30/23	1/1/25-0/50/20	1/1/20-0/30/27	111/21-0/30/20	// 1/24-0/30/20
13 Salaries & Benefits	\$64,832	\$66,777	\$68,112	\$69,475	\$269.196
14 Operating Expense	\$36,590	\$37.687	\$38,441	\$39.210	\$151,928
15 Capital Expenditure	\$00,000	<i>\</i> \\\\\	¢00,111	<i>\\</i>	\$(
16 Subtotal	\$101,422	\$104,464	\$106,553	\$108,685	\$421,12
17 Indirect Percentage (%) (max. 15%)	15%	15%	15%	15%	159
18 Indirect Cost (Line 16 X Line 17)	\$15,213	\$15,670	\$15,983	\$16,303	\$63,16
19 Total DAS Expenditures	\$116,635	\$120,134	\$122,537	\$124,988	\$484,29
20 Developer Match Expenditures					
21 Salaries & Benefits	\$134,400	\$138,432	\$142,585	\$146,863	\$562,27
22 Operating Expense	\$60,781	\$62,604	\$64,482	\$66,417	\$254,28
23 Capital Expenditure	\$0	\$0	\$0	\$0	\$
24 Subtotal	\$195,181	\$201,036	\$207,067	\$213,280	\$816,56
25 Indirect Percentage (%)	10%	10%	10%	10%	109
26 Indirect Cost (Line 16 X Line 17)	\$19,518	\$20,104	\$20,707	\$21,328	\$81,65
27 Total Developer Expenditures	\$214,699	\$221,140	\$227,774	\$234,607	\$898,22
28					
29 Total DAS and Developer Expenditures	\$331,334	\$341,273	\$350,310	\$359,596	\$1,382,51
30 DAS Revenues					
31 Local General Fund	\$116,635	\$120,134	\$122,537	\$124,988	\$484,29
32					
33					
34					
36					
37					
38					
39 TOTAL DAS REVENUES	\$116,635	\$120,134	\$122,537	\$124,988	\$484,29
40 Developer Revenues	 	¢:_0,:0:	¢:==,001	¢ 12 1,000	¢ : 0 : ,20
41 Developer Match Funds	\$214,699	\$221,140	\$227,774	\$234,607	\$898,22
42		. ,	. ,	, ,	. ,
43					
44					
45 Total Developer Revenues	\$214,699	\$221,140	\$227,774	\$234,607	\$898,22
46 Total Revenues	\$331,334	\$341,273	\$350,310	\$359,596	\$1,382,5 ²
47 Full Time Equivalent (FTE)					
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49 Prepared by:		Telephone No.		I	Date:
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2										Docume	ent Date: 3/1/2024
3 4	Grantee Name: Mercy Housing California										
5	Program Name: 1880 Pine										
6											
7				Salaries & E	Benefits	Detail					
8		_									
9	DAS SALARIES & BENEFITS			-6/30/25		5-6/30/26		5-6/30/27		-6/30/28	TOTAL
10		Annual Full Time	Budge	ted Salary	Budge	eted Salary	Budge	ted Salary	Budget	ed Salary	TOTAL
11	POSITION TITLE	Salary for FTE	FTE	SALARIES	FTE	SALARIES	FTE	SALARIES	FTE	SALARIES	7/1/24-6/30/28
12	Resident Services Coordinator II	\$70,000	0.500	\$35,000	0.500	\$36,050	0.500	\$36,771	0.500	\$37,506	\$145,327
13	Resident Services Manager I	\$90,000	0.050	\$4,500	0.050	\$4,635	0.050	\$4,728	0.050	\$4,822	\$18,685
14	Resident Services Manager II	\$100,000	0.050	\$5,000	0.050	\$5,150	0.050	\$5,253	0.050	\$5,358	\$20,761
15	Admin/Contract Specialist	\$55,000	0.070	\$3,850	0.070	\$3,966	0.070	\$4,045	0.070	\$4,126	\$15,986
16	Associate Director, Senior Services	\$115,000	0.020	\$2,300	0.020	\$2,369	0.020	\$2,416	0.020	\$2,465	\$9,550
17											
18											
19											
20											
21											
22	TOTALS	\$430,000	0.690	\$50,650	0.690	\$52,170	0.690	\$53,213	0.690	\$54,277	\$210,310
23		\$100,000	0.000	<i>400,000</i>	0.000	<i>402,110</i>	0.000	\$00,210	0.000	\$01,211	\$210,010
24		1		-							
25	EMPLOYEE FRINGE BENEFITS	l	28%	\$14,182	28%	\$14,607	28%	\$14,900	28%	\$15,198	\$58,887
26 27											
	TOTAL DAS SALARIES & BENEFITS			\$64,832		\$66,777		\$68,112		\$69,475	\$269,196
29		L		\$04,00 <u>2</u>		<i>400,111</i>		<i>400,112</i>		\$00,410	\$200,100
30	DEVELOPER MATCH POSITION TITLE										
	Resident Services Coordinator II	\$70,000	0.500	\$35,000	0.500	\$36,050	0.500	\$37,132	0.500	\$38,245	\$146,427
	Resident Services Coordinator II	\$70,000	1.000	\$70,000	1.000	\$72,100	1.000	\$74,263	1.000	\$76,491	\$292,854
33											\$0
34											\$0
35											\$0
36											\$0
37	TOTALS	\$140,000	1.500	\$105,000	1.500	\$108,150	1.500	\$111,395	1.500	\$114,736	\$439,281
38											
	EMPLOYEE FRINGE BENEFITS		28%	\$29,400	28%	\$30,282	28%	\$31,190	28%	\$32,126	\$122,999
40		L. L		,		, .=					
	TOTAL DEVELOPER SALARIES & BENEFITS	[\$134,400		\$138,432		\$142,585		\$146,863	\$562,279
	TOTAL SALARIES & BENEFITS		2.190	\$199,232	2.190	\$205,209	2.190	\$210,697	2.190	\$216,337	\$831,476
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4	Grantee Name: Mercy Housing California							
5 6	Program Name: 1880 Pine							
7			C	Operati	ng Expense De	etail		
8				-				
9 10	DAS EXPENDITURE CATEGORY	FERM	7/1/24-6/3	0/25	7/1/25-6/30/26	7/1/26-6/30/27	7/1/27-6/30/28	TOTAL 7/1/24-6/30/28
	Rental of Property		111124 0/0	0/20	111120 0100/20	111120 0100121	111121 0/00/20	111124 0100120
	1							
	Utilities(Elec, Water, Gas, Phone, Garbage)			0.000				
	Office Supplies, Postage		*	2,000	\$2,000	\$2,000	\$2,000	\$8,000
	Building Maintenance and Repair					<u></u>		
15	Printing and Reproduction							
16	Insurance					<u> </u>		
17	Staff Training		\$	2,000	\$2,000	\$2,000	\$2,000	\$8,000
18	Staff Travel (Local & Out of Town)			\$800	\$800	\$800	\$800	\$3,200
19	Rental of Equipment					<u> </u>		
20								
21	<u>CONSULTANTS</u>							
22	Consultant A							
23	Consultant B							
24	Consultant C							
25								
26	OTHER							
27								
28	Supplies for Monthly Community Projects & Events		\$2	8,790	\$29,387	\$29,641	\$29,910	\$117,728
30	Translation			3,000	\$3,500		\$4,500	\$15,000
31	-							
32	TOTAL DAS OPERATING EXPENSE		\$3	6,590	\$37,687	\$38,441	\$39,210	\$151,928
33								
34	DEVELOPER MATCH OPERATING EXPENSE	<u>E</u>						
35	Rental of Property					<u></u>		\$0
36	Utilities(Elec, Water, Gas, Phone, Garbage)							\$0
37	Office Supplies, Postage							\$0
38	Building Maintenance and Repair							\$0
39	Printing and Reproduction							\$0
40	Insurance							\$0
	Staff Training							\$0
	Staff Travel (Local & Out of Town)							\$0
	Other: Wellness Nurse 0.35 FTE			0,781	\$62,604	\$64,482	\$66,417	\$254,284
44	1			-,	\ \\\\\\\\\\\\\\\\\\\\\\\\\\\\\\			
	TOTAL DEVELOPER OPERATING EXPENSE	:	¢A	0,781	\$62,604	\$64,482	\$66,417	\$254,284
46		-						
47 48	TOTAL OPERATING EXPENSE		\$9	7,371	\$100,291	\$102,923	\$105,627	\$406,212
	HSA #3							

Appendix A – Services to be Provided Mercy Housing RAD Housing Support Services at 2698 California Street July 1, 2024 through June 30, 2028

I. Purpose

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of this grant is to provide support services to older adults and adults with disabilities residing in San Francisco RAD converted housing development units, and to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

Adult with a	A person 18 to 59 years of age living with a disability
Disability	
At Risk of	To be considered at risk of institutionalization, a person must have, at a
Institutionalization	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	Human Services Agency's Contracts Administration Reporting and Billing
	Online (CARBON) system
City	City and County of San Francisco, a municipal corporation
Communities of Color	An inclusive and unifying term for persons who do not identify as White,
	who have been historically and systemically disadvantaged by
	institutionalized and interpersonal racism.
DAS	Department of Disability and Aging Services
Disability	A condition, or combination of conditions, 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	Mercy Housing
Health and Wellness	Any service that supports and/or promotes tenants' health and well-being
Services	(i.e. Adult Day Health, nutrition programs, free health screenings, DAS
	services, etc.).
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

II. Definitions

	assigned at birth. This includes, but is not limited to, lesbian, gay, bisexual,
	transgender, genderqueer, and gender nonbinary.
Limited English-	Any person who does not speak English well or is otherwise unable to
Speaking Proficiency	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, as 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.
MOHCD	Mayor's Office of Housing and Community Development
OCM	Office of Contract Management, San Francisco Human Services Agency
OCP	Office of Community Partnerships, Department of Disability and Aging
	Services
Older Adult	Person who is 60 years or older, used interchangeably with "senior."
RAD	Rental Assistance Demonstration
Senior	Person who is 60 years or older, used interchangeably with "older adult."
SF-HSA	Human Services Agency of the City and County of San Francisco.
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
	contractors that provide health care and social services to seek to collect and
	analyze data concerning the sexual orientation and gender identity of the
	clients they serve (Chapter 104, Sections 104.1 through 104.9).

III. Target Population

This program is designed to serve all ethnicities and populations in Grantee's RAD converted housing units, with focused expertise to promote the unique cultural needs which have been identified as demonstrating the greatest economic and social need:

- Persons with low income
- Persons who are socially isolated
- Persons with limited English-speaking proficiency
- Persons from communities of color
- Persons who identify as LGBTQ+
- Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be:

- An older adult, aged 60 years or over or
- An adult with a disability, aged 18-59 and
- Residing in housing units at the locations indicated below

V. Location and Time of Services

Services will be provided at 2698 California Street, San Francisco, CA, 94115, Monday through Friday, during regular office hours of 8:30 a.m. to 5:30 p.m., excluding holidays. On occasion, workshops or events will be provided after hours or on weekends.

VI. Description of Services and Program Requirements

- 1. Grantee will provide four categories of services to older adults and adults with disabilities under this grant:
 - i. Outreach
 - a. Establish and maintain positive relationships with tenants.
 - b. Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.
 - c. Contact all new tenants to invite them to join community activities.
 - d. Contact, interact, inform, and invite all tenants to make use of support services to assist with and address individual needs or issues. These efforts will include a variety of outreach techniques such as written messages in appropriate languages, flyers, brochures, telephone calls, open-house events, and emails (as available).
 - ii. Service Connection
 - a. Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
 - b. Provide service needs assessment, information and referral, crisis intervention, and counseling with individuals and groups of tenants, as needed.
 - c. Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
 - d. Provide short-term case management services to tenants as needed, while working to connect those with longer-term needs to ongoing case management services.
 - e. Serve as a liaison or advocate for tenants with other service providers.
 - f. Assist tenants in identifying and accessing community services needed to meet tenant's specific needs or to make progress toward identified goals.
 - iii. Housing Stability
 - a. Work cooperatively and as part of a team with property management staff to meet the needs of tenants.

- b. Conduct direct outreach to all tenants who become delinquent in rent payments, and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- c. Conduct direct outreach to all tenants who are experiencing safety concerns or lease/house rule violations, or who have been involved in critical incidents.
- d. Provide information on various topics that will help tenants maintain their housing; provide assistance in communicating with, responding to, and meeting with property management to help tenancies resolve issues related to housing; provide assistance in the remedy of incidences and/or lease violations that could lead to eviction by establishing written plans; and/or provide assistance with conflict resolution for tenants who need to solve problems or resolve conflicts with other tenants.
- iv. Community Engagement
 - a. Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.
 - b. Provide tenants with opportunities to participate in organized gatherings for peer support, social connections, celebrations/commemorations, and other community events held onsite.
 - c. Provide trainings and educational workshops on a variety of topics relating to health, wellness, finance, housing, and other topics.
- 2. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS|OCP policy memoranda.
- 3. Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.
- 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS|OCP. Grantee will share the survey results with DAS|OCP by March 15th each grant year, or on a mutually agreed-upon date between DAS|OCP and Grantee.
- 5. Grantee will hire, train, and supervise .33 FTE (leveraged and/or grant-funded) to provide services.
- 6. Grantee will ensure adequate and culturally-competent staffing to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all program standards. Grantee will ensure services are available in the languages of the tenant population being served.
- 7. Grantee will ensure that units of service provided are tracked and distinguishable.
- 8. Grantee will attend in-service trainings and meetings coordinated and provided by DAS|OCP, and share the information with their staff and volunteers as needed. Grantee will attend RAD-related, MOHCD, and other meetings as needed.
- 9. Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- 10. Grantee is a mandated reporter for witnessed or suspected elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- 11. Grantee will communicate and collaborate regularly with DAS to help provide logistical and operational support to the program, to provide quality services to tenants, and to strategize program direction and services provision.

VII. Service Objectives

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

- Grantee will have individual and group service encounters with at least 65% of unduplicated tenants per month.
- Grantee will provide tenants with a minimum of two (2) activities or events per week (or 104 annually). Types of activities annually must be at least 10% trainings/workshops, 25% health- and wellness-related, and 65% all other.
- All (100%) of households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will provide services to 100% of unduplicated tenants annually. Services can be individual services, community activities, and/or outreach.

VIII. Outcome Objectives

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

- Tenants will feel connected to and involved with their tenant/resident community. At least 50% of unduplicated residents participating in the annual survey will feel "strongly" or "very strongly" about being connected to and involved with their tenant/resident community.
 - Grantee will use the following standardized question: How strongly do you feel connected to and involved with the tenant/resident community at [site]? The options to answer should be "very strongly," "strongly," "somewhat," and "not at all."
- Tenants will have better access to resources improving their health and wellness. At least 50% of unduplicated tenants participating in the annual survey will "agree" or "highly agree" that they have better access to resources that improve their health and wellness.
 - Grantee will use the following standardized question: Do you have better access to resources that increase your health and wellness? The options to answer should be "highly agree," "agree," "neutral," "disagree," and "highly disagree."
- Tenants will have stable housing. At least 95% of households will have obtained and/or maintained reliable, secure, and stable housing that meets the needs of individuals and households.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers into the grantee's

database, using a DAS|OCP-approved intake form.

- 2. Annual and monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
 - a. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VIII (Outcome Objectives). This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th day of the month following the end of the program year.
 - i. Number and percentage of unduplicated tenants to whom services were provided annually.
 - ii. Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "strongly" or "very strongly" when asked about being connected to and involved with their tenant/resident community.
 - iii. Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "agree" or "highly agree" when asked about having better access to resources that improve their health and wellness.
 - iv. Number and percentage of households that have obtained and/or maintained stable housing.
 - b. Grantee will provide a monthly report of activities, referencing the tasks as described in Section VII (Service Objectives). Grantee will enter the monthly metrics in the CARBON database by the 15th day of the following month.
 - i. Number and percentage of unduplicated tenants with individual and group service encounters.
 - ii. Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - iii. Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- 3. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed-upon date between DAS|OCP and the Grantee.
- 4. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and a Security Awareness Training on an annual basis. The Grantee will maintain evidence of staff completion of these trainings.
- 5. Grantee will issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The Grantee must submit the report in CARBON.

- 6. Grantee will develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
- 7. Grantee will develop and deliver a bi-annual summary report of SOGI data collected as required by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10 (June-December data) and July 10 (January-June data).
- 8. Grantee will maintain an updated site chart, using the DAS|OCP approved form, with details about the program.
- 9. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable, and will take all reasonable efforts to implement HIPAA requirements.
- 10. Grantee will develop a grievance policy consistent with DAS|OCP policy memorandum.

For assistance with reporting requirements or submission of reports, contact:

Rocio Duenas Rocio.Duenas@sfgov.org Principal Contract Manager, Office of Contract Management Human Services Agency

or

Rosemarie Tocchini Rosemarie.Tocchini@sfgov.org Program Analyst, Office of Community Partnerships Department of Disability and Aging Services

X. Monitoring Activities

A. <u>Program Monitoring</u>: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates; backup documentation for the units of service and all reporting; progress of service and outcome objectives; the methods by which participant records are collected and maintained; reporting performance; maintenance of service unit logs; agency and organization standards, including a current organizational chart and evidence of provision of annual training to staff in Elder Abuse Prevention and Reporting and Security Awareness; review of program operation, including a review of a written policies-and-procedures manual of all OCP-funded programs; written project income polices if applicable; grievance procedure (must be posted in the center/office and distributed to those consumers who are homebound); site chart with current hours of operation; a board of director list; whether services are provided appropriately according to sections VII (Service Objectives) and VIII (Outcome Objectives); logs of service units based on hours of scheduled activities; sign-in sheets of consumers participating in each activity; and documentation showing the reported units of service are based on scheduled activities at the site.

B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, the quarterly balance sheet, the 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 the Personnel Manual, the Emergency Operations Plan, compliance with the Americans with Disabilities Act, subcontracts, MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

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3 HUMA	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY							
4		BY PROGRAM						
5 Grantee Name:			Grant Term:					
5 Grantee Name.	Grantee Name:							
6 Mercy Housing Californi	Mercy Housing California							
7 (Check One) New X Renewal	Modification							
8 If modification, Effective Date of Mod.	No. of Mod.							
9 Program: 2698 California (RAD Seniors)								
10 Pudget Peference Page No.(c)					TOTAL			
10 Budget Reference Page No.(s)	7/4/24 6/20/25	7/4/25 6/20/26	7/4/26 6/20/27	7/4/27 6/20/29	_			
11 Program Term 12 DAS Expenditures	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			
	¢20.262	¢20 E42	¢40.202	¢44.400	¢450.00			
13 Salaries & Benefits 14 Operating Expense	\$38,362 \$12,467	\$39,512 \$12,841	. ,	\$41,109 \$13,350	\$159,28 \$51,75			
15 Capital Expenditure	φ12,407	φ12,041	\$13,097	\$13,330	\$			
16 Subtotal	\$50,829	\$52,353	\$53,400	\$54,459	\$211,04			
17 Indirect Percentage (%) (max. 15%)	15%	15%		15%	15			
18 Indirect Cost (Line 16 X Line 17)	\$7,624	\$7,853	\$8,010	\$8,179	\$31,66			
19 Total DAS Expenditures	\$58,453	\$60,206	\$61,410	\$62,638	\$242,70			
20 Developer Match Expenditures	,,	,,						
21 Salaries & Benefits	\$76,838	\$79,144	\$81,518	\$83,963	\$321,46			
22 Operating Expense	\$0	\$0	\$0	\$0	\$			
23 Capital Expenditure	\$0	\$0	\$0	\$0	\$			
24 Subtotal	\$76,838	\$79,144	\$81,518	\$83,963	\$321,46			
25 Indirect Percentage (%)	10%	10%	10%	10%	10'			
26 Indirect Cost (Line 16 X Line 17)	\$7,684	\$7,914	\$8,152	\$8,396	\$32,14			
27 Total Developer Expenditures	\$84,522	\$87,058	\$89,670	\$92,360	\$353,61			
28								
29 Total DAS and Developer Expenditures	\$142,975	\$147,264	\$151,079	\$154,997	\$596,31			
30 DAS Revenues								
31 Local General Fund	\$58,453	\$60,206	\$61,410	\$62,638	\$242,70			
32								
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38								
39 TOTAL DAS REVENUES	\$58,453	\$60,206	\$61,410	\$62,638	\$242,70			
40 Developer Revenues	ψυ0,400	ψ00,200	ψ01,410	ψ02,000	ψ242,70			
40 Developer Match Funds	\$84,522	\$87,058	\$89,670	\$92,360	\$353,61			
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15 Total Developer Revenues	\$84,522	\$87,058	\$89,670	\$92,360	\$353,61			
46 Total Revenues	\$142,975	\$147,264	\$151,079	\$154,997	\$596,3 ²			
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2 3										Documen	11 Date: 3/22/2024
4 5	Grantee Name: Mercy Housing California Program Name: 2698 California										
5 6	Program Name: 2090 Camornia										
7			:	Salaries & E	Benefits	Detail					
8											
9	DAS SALARIES & BENEFITS			-6/30/25		5-6/30/26		6-6/30/27		-6/30/28	TOTAL
10		Annual Full Time	Budget	ed Salary	Budge	ted Salary	Budge	ted Salary	Budget	ed Salary	TOTAL
11	POSITION TITLE	Salary for FTE	FTE	SALARIES	FTE	SALARIES	FTE	SALARIES	FTE	SALARIES	7/1/24-6/30/28
12	Resident Services Manager I	\$90,000	0.333	\$29,970	0.333	\$30,869	0.333	\$31,486	0.333	\$32,116	\$124,442
13											
14											
15											
16											
17											
18											
19											
20											
21											
22	TOTALS	\$90,000	0.333	\$29,970	0.333	\$30,869	0.333	\$31,486	0.333	\$32,116	\$124,442
23 24	101/120	\$00,000	0.000	<i>\\</i> 20,010	0.000	<i>\</i> 00,000	0.000	φ01,400	0.000	ψ 0 2,110	ψ12-1, 112
		Γ									
25 26	EMPLOYEE FRINGE BENEFITS	l	28%	\$8,392	28%	\$8,643	28%	\$8,816	28%	\$8,993	\$34,844
27		r									
28	TOTAL DAS SALARIES & BENEFITS			\$38,362		\$39,512		\$40,303		\$41,109	\$159,285
29											
30	DEVELOPER MATCH POSITION TITLE										
31	Resident Services Manager I	\$90,000	0.667	\$60,030	0.667	\$61,831	0.667	\$63,686	0.667	\$65,596	\$251,143
32											\$0
33											\$0
34											\$0
35											\$0
36											\$0
37	TOTALS	\$90,000	0.667	\$60,030	0.667	\$61,831	0.667	\$63,686	0.667	\$65,596	\$251,143
38		<u> </u>									
	EMPLOYEE FRINGE BENEFITS		28%	\$16,808	28%	\$17,313	28%	\$17,832	28%	\$18,367	\$70,320
40		L		, -							
	TOTAL DEVELOPER SALARIES & BENEFITS			\$76,838		\$79,144		\$81,518		\$83,963	\$321,463
	TOTAL SALARIES & BENEFITS		1.000	\$115,200	1.000	\$118,656	1.000	\$121,821	1.000	\$125,072	\$480,749
43		L		ų,200		÷,		Ψ.Ξ1,0E1		¥.20,072	÷100,1-10
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2						Do	cument Date: 3/1/2024
4	Grantee Name: Mercy Housing California						
5 6	Program Name: 2698 California						
7			Operat	ing Expense Det	ail		
8							TOTAL
9 10	DAS EXPENDITURE CATEGORY	TERM	7/1/24-6/30/25	7/1/25-6/30/26	7/1/26-6/30/27	7/1/27-6/30/28	TOTAL 7/1/24-6/30/28
	Rental of Property						\$0
	Utilities(Elec, Water, Gas, Phone, Garbage)						\$0
	Office Supplies, Postage						\$0
	Building Maintenance and Repair						\$0
	Printing and Reproduction						\$0
	Insurance						\$0
	Staff Training						\$0
	Staff Travel (Local & Out of Town)						\$0
							\$0
20	Rental of Equipment						\$U
	<u>CONSULTANTS</u>						
	Consultant A						\$0
	Consultant B						\$0
23	Consultant C						\$0
25							ψυ
26	OTHER						
27		-					
28	Supplies for Monthly Community Projects & Events		\$12,467	\$12,841	\$13,097	\$13,350	\$51,755
29		-	ψ12,407	φ12,0+1	φ10,007	φ10,000	\$0
30		-					\$0
31							
	TOTAL DAS OPERATING EXPENSE		\$12,467	\$12,841	\$13,097	\$13,350	\$51,755
33							
34	DEVELOPER MATCH OPERATING EXPEN	<u>ISE</u>					
35	Rental of Property						\$0
36	Utilities(Elec, Water, Gas, Phone, Garbage)						\$0
37	Office Supplies, Postage						\$0
38	Building Maintenance and Repair						\$0
39	Printing and Reproduction						\$0
40	Insurance						\$0
41	Staff Training						\$0
42	Staff Travel (Local & Out of Town)						\$0
43	Rental of Equipment						\$0
44							
45 46	TOTAL DEVELOPER OPERATING EXPEN	SE	\$0	\$0	\$0	\$0	\$0
40	TOTAL OPERATING EXPENSE		\$12,467	\$12,841	\$13,097	\$13,350	\$51,755
47 48			<i>ф.</i> =, . ө.	+ · = , = · · ·	1 - 1 - 1	÷,	÷••;•••

Appendix A – Services to be Provided Mercy Housing RAD Housing Support Services at 345 Arguello Boulevard July 1, 2024 through June 30, 2028

I. Purpose

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of this grant is to provide support services to older adults and adults with disabilities residing in San Francisco RAD converted housing development units, and to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

Adult with a	A person 18 to 59 years of age living with a disability					
Disability						
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 					
	 (ADL): cating, dressing, transferring, batting, toneting, and grooming, of 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	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system					
City	City and County of San Francisco, a municipal corporation					
Communities of Color	An inclusive and unifying term for persons who do not identify as White, who have been historically and systemically disadvantaged by institutionalized and interpersonal racism.					
DAS	Department of Disability and Aging Services					
Disability	A condition, or combination of conditions, 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	Mercy Housing					
Health and Wellness Services	Any service that supports and/or promotes tenants' health and well-being (i.e. Adult Day Health, nutrition programs, free health screenings, DAS services, etc.).					
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					

II. Definitions

assigned at birth. This includes, but is not limited to, lesbian, gay, bisexual,
transgender, genderqueer, and gender nonbinary.
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.
Having income at or below 300% of the federal poverty line, as 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.
Mayor's Office of Housing and Community Development
Office of Contract Management, San Francisco Human Services Agency
Office of Community Partnerships, Department of Disability and Aging
Services
Person who is 60 years or older, used interchangeably with "senior."
Rental Assistance Demonstration
Person who is 60 years or older, used interchangeably with "older adult."
Human Services Agency of the City and County of San Francisco.
Having few social relationships and few people to interact with regularly.
Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the
San Francisco Administrative Code to require City departments and
contractors that provide health care and social services to seek to collect and
analyze data concerning the sexual orientation and gender identity of the
clients they serve (Chapter 104, Sections 104.1 through 104.9).

III. Target Population

This program is designed to serve all ethnicities and populations in Grantee's RAD converted housing units, with focused expertise to promote the unique cultural needs which have been identified as demonstrating the greatest economic and social need:

- Persons with low income
- Persons who are socially isolated
- Persons with limited English-speaking proficiency
- Persons from communities of color
- Persons who identify as LGBTQ+
- Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be:

- An older adult, aged 60 years or over or
- An adult with a disability, aged 18-59 and
- Residing in housing units at the locations indicated below

V. Location and Time of Services

Services will be provided at 345 Arguello Boulevard, San Francisco, CA, 94118, Monday through Friday, during regular office hours of 8:30 a.m. to 5:30 p.m., excluding holidays. On occasion, workshops or events will be provided after hours or on weekends.

VI. Description of Services and Program Requirements

- 1. Grantee will provide four categories of services to older adults and adults with disabilities under this grant:
 - i. Outreach
 - a. Establish and maintain positive relationships with tenants.
 - b. Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.
 - c. Contact all new tenants to invite them to join community activities.
 - d. Contact, interact, inform, and invite all tenants to make use of support services to assist with and address individual needs or issues. These efforts will include a variety of outreach techniques such as written messages in appropriate languages, flyers, brochures, telephone calls, open-house events, and emails (as available).
 - ii. Service Connection
 - a. Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
 - b. Provide service needs assessment, information and referral, crisis intervention, and counseling with individuals and groups of tenants, as needed.
 - c. Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
 - d. Provide short-term case management services to tenants as needed, while working to connect those with longer-term needs to ongoing case management services.
 - e. Serve as a liaison or advocate for tenants with other service providers.
 - f. Assist tenants in identifying and accessing community services needed to meet tenant's specific needs or to make progress toward identified goals.
 - iii. Housing Stability
 - a. Work cooperatively and as part of a team with property management staff to meet the needs of tenants.

- b. Conduct direct outreach to all tenants who become delinquent in rent payments, and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- c. Conduct direct outreach to all tenants who are experiencing safety concerns or lease/house rule violations, or who have been involved in critical incidents.
- d. Provide information on various topics that will help tenants maintain their housing; provide assistance in communicating with, responding to, and meeting with property management to help tenancies resolve issues related to housing; provide assistance in the remedy of incidences and/or lease violations that could lead to eviction by establishing written plans; and/or provide assistance with conflict resolution for tenants who need to solve problems or resolve conflicts with other tenants.
- iv. Community Engagement
 - a. Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.
 - b. Provide tenants with opportunities to participate in organized gatherings for peer support, social connections, celebrations/commemorations, and other community events held onsite.
 - c. Provide trainings and educational workshops on a variety of topics relating to health, wellness, finance, housing, and other topics.
- 2. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS|OCP policy memoranda.
- 3. Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.
- 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS|OCP. Grantee will share the survey results with DAS|OCP by March 15th each grant year, or on a mutually agreed-upon date between DAS|OCP and Grantee.
- 5. Grantee will hire, train, and supervise .14 FTE (leveraged and/or grant-funded) to provide services.
- 6. Grantee will ensure adequate and culturally-competent staffing to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all program standards. Grantee will ensure services are available in the languages of the tenant population being served.
- 7. Grantee will ensure that units of service provided are tracked and distinguishable.
- 8. Grantee will attend in-service trainings and meetings coordinated and provided by DAS|OCP, and share the information with their staff and volunteers as needed. Grantee will attend RAD-related, MOHCD, and other meetings as needed.
- 9. Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- 10. Grantee is a mandated reporter for witnessed or suspected elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- 11. Grantee will communicate and collaborate regularly with DAS to help provide logistical and operational support to the program, to provide quality services to tenants, and to strategize program direction and services provision.

VII. Service Objectives

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

- Grantee will have individual and group service encounters with at least 65% of unduplicated tenants per month.
- Grantee will provide tenants with a minimum of two (2) activities or events per week (or 104 annually). Types of activities annually must be at least 10% trainings/workshops, 25% health- and wellness-related, and 65% all other.
- All (100%) of households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will provide services to 100% of unduplicated tenants annually. Services can be individual services, community activities, and/or outreach.

VIII. Outcome Objectives

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

- Tenants will feel connected to and involved with their tenant/resident community. At least 50% of unduplicated residents participating in the annual survey will feel "strongly" or "very strongly" about being connected to and involved with their tenant/resident community.
 - Grantee will use the following standardized question: How strongly do you feel connected to and involved with the tenant/resident community at [site]? The options to answer should be "very strongly," "strongly," "somewhat," and "not at all."
- Tenants will have better access to resources improving their health and wellness. At least 50% of unduplicated tenants participating in the annual survey will "agree" or "highly agree" that they have better access to resources that improve their health and wellness.
 - Grantee will use the following standardized question: Do you have better access to resources that increase your health and wellness? The options to answer should be "highly agree," "agree," "neutral," "disagree," and "highly disagree."
- Tenants will have stable housing. At least 95% of households will have obtained and/or maintained reliable, secure, and stable housing that meets the needs of individuals and households.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers into the grantee's

database, using a DAS|OCP-approved intake form.

- 2. Annual and monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
 - a. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VIII (Outcome Objectives). This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th day of the month following the end of the program year.
 - i. Number and percentage of unduplicated tenants to whom services were provided annually.
 - ii. Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "strongly" or "very strongly" when asked about being connected to and involved with their tenant/resident community.
 - iii. Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "agree" or "highly agree" when asked about having better access to resources that improve their health and wellness.
 - iv. Number and percentage of households that have obtained and/or maintained stable housing.
 - b. Grantee will provide a monthly report of activities, referencing the tasks as described in Section VII (Service Objectives). Grantee will enter the monthly metrics in the CARBON database by the 15th day of the following month.
 - i. Number and percentage of unduplicated tenants with individual and group service encounters.
 - ii. Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - iii. Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- 3. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed-upon date between DAS|OCP and the Grantee.
- 4. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and a Security Awareness Training on an annual basis. The Grantee will maintain evidence of staff completion of these trainings.
- 5. Grantee will issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The Grantee must submit the report in CARBON.

- 6. Grantee will develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
- 7. Grantee will develop and deliver a bi-annual summary report of SOGI data collected as required by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10 (June-December data) and July 10 (January-June data).
- 8. Grantee will maintain an updated site chart, using the DAS|OCP approved form, with details about the program.
- 9. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable, and will take all reasonable efforts to implement HIPAA requirements.
- 10. Grantee will develop a grievance policy consistent with DAS|OCP policy memorandum.

For assistance with reporting requirements or submission of reports, contact:

Rocio Duenas Rocio.Duenas@sfgov.org Principal Contract Manager, Office of Contract Management Human Services Agency

or

Rosemarie Tocchini Rosemarie.Tocchini@sfgov.org Program Analyst, Office of Community Partnerships Department of Disability and Aging Services

X. Monitoring Activities

A. <u>Program Monitoring</u>: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates; backup documentation for the units of service and all reporting; progress of service and outcome objectives; the methods by which participant records are collected and maintained; reporting performance; maintenance of service unit logs; agency and organization standards, including a current organizational chart and evidence of provision of annual training to staff in Elder Abuse Prevention and Reporting and Security Awareness; review of program operation, including a review of a written policies-and-procedures manual of all OCP-funded programs; written project income polices if applicable; grievance procedure (must be posted in the center/office and distributed to those consumers who are homebound); site chart with current hours of operation; a board of director list; whether services are provided appropriately according to sections VII (Service Objectives) and VIII (Outcome Objectives); logs of service units based on hours of scheduled activities; sign-in sheets of consumers participating in each activity; and documentation showing the reported units of service are based on scheduled activities at the site.

B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, the quarterly balance sheet, the 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 the Personnel Manual, the Emergency Operations Plan, compliance with the Americans with Disabilities Act, subcontracts, MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

Grantee Name: <u>Mercy Housing Californi</u> Check One) New <u>X</u> Renewal modification, Effective Date of Mod. rogram: 345 Arguello (RAD Seniors) udget Reference Page No.(s) rogram Term	a	BY PROGRAM	ACT BUDGET SU Grant Term: July 1, 2024 - June 3	Docume	pendix B, Page 1 ent Date: 5/22/202									
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	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 Expenditures	111124-0/00/20	111120-0/00/20	111120-0100121	111121-0/00/20	111124-0/00/20									
alaries & Benefits	\$14,272	\$14,700	\$14.994	\$15.294	\$59,26									
perating Expense	\$22,553	\$23.230	¥)	\$24,168	\$93,64									
apital Expenditure	·,•••	, , , ,	+,		\$									
ubtotal	\$36,825	\$37,930	\$38,688	\$39,462	\$152,90									
direct Percentage (%) (max. 15%)	15%	15%	15%	15%	15									
direct Cost (Line 16 X Line 17)	\$5.524	\$5,690	\$5,803	\$5.919	\$22,93									
otal DAS Expenditures	\$42,349	\$43,620	\$44,492	\$45,382	\$175,84									
Developer Match Expenditures	<i>,,,,,,,</i>	+ ; - = -	<i>, ,</i>											
alaries & Benefits	\$115,200	\$118,656	\$122,216	\$125,882	\$481,95									
perating Expense	\$17,366	\$17,887	\$18,424	\$18,976	\$72,65									
	\$0		\$0	\$0	\$									
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otal Developer Expenditures	\$145,823	\$150,197	\$154,704	\$159,344	\$610,06									
	\$400.474	\$100.04 7	\$100,100		# 705.04									
	\$188,171	\$193,817	\$199,196	\$204,726	\$785,91									
ocal General Fund	\$42,349	\$43,620	\$44,492	\$45,382	\$175,84									
OTAL DAS REVENUES	\$42.349	\$43.620	\$44,492	\$45.382	\$175,84									
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	•	ibtotal \$132,566 direct Percentage (%) 10% direct Cost (Line 16 X Line 17) \$13,257 ital Developer Expenditures \$145,823 ital DAS and Developer Expenditures \$188,171 DAS Revenues \$42,349 cal General Fund \$42,349 Developer Revenues \$42,349 Developer Revenues \$42,349 Difference \$145,823 difference \$145,823	bbtotal \$132,566 \$136,543 direct Percentage (%) 10% 10% direct Cost (Line 16 X Line 17) \$13,257 \$13,654 tal Developer Expenditures \$145,823 \$150,197 tal DAS and Developer Expenditures \$188,171 \$193,817 DAS Revenues cal General Fund \$42,349 V43,620 DTAL DAS REVENUES \$42,349 V43,620 Developer Revenues eveloper Revenues V43,620 DTAL DAS REVENUES \$42,349 V43,620 Developer Revenues eveloper Revenues V43,620 Diveloper Revenues V43,620 Diveloper Revenues V43,620 Diveloper Revenues V43,620 Diveloper Revenues V443,620 Diveloper Revenues V43,620 Diveloper Revenues	bbtotal \$132,566 \$136,543 \$140,640 direct Percentage (%) 10% 10% 10% direct Cost (Line 16 X Line 17) \$13,257 \$13,654 \$14,064 tal Developer Expenditures \$145,823 \$150,197 \$154,704 tal DAS and Developer Expenditures \$188,171 \$193,817 \$199,196 DAS Revenues \$42,349 \$43,620 \$44,492 cal General Fund \$42,349 \$43,620 \$44,492 Developer Revenues \$42,349 \$43,620 \$44,492 DTAL DAS REVENUES \$42,349 \$43,620 \$44,492 Developer Revenues \$145,823 \$150,197 \$154,704 dial Revenues \$188,171 \$193,817 \$199,196	bbtotal \$132,566 \$136,543 \$140,640 \$144,858 direct Percentage (%) 10% 10% 10% 10% direct Cost (Line 16 X Line 17) \$13,257 \$13,654 \$14,064 \$14,486 tal Developer Expenditures \$145,823 \$150,197 \$154,704 \$159,344 tal DAS and Developer Expenditures \$188,171 \$193,817 \$199,196 \$204,726 DAS Revenues \$42,349 \$43,620 \$44,492 \$45,382 cal General Fund \$42,349 \$43,620 \$44,492 \$45,382 DTAL DAS REVENUES \$42,349 \$43,620 \$44,492 \$45,382 DTAL DAS REVENUES \$42,349 \$43,620 \$44,492 \$45,382 Developer Revenues \$145,823 \$150,197 \$154,704 \$159,344 tal Developer Revenues \$145,823 \$150,197 \$154,704 \$159,344 tal Developer Revenues \$145,823 \$150,197 \$154,704 \$159,344 tal Developer Revenues \$145,823 \$150,197 \$154,704 \$159,344 </td									

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4	Grantee Name: Mercy Housing California											
	Program Name: 345 Arguello											
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8												
9	DAS SALARIES & BENEFITS				4-6/30/25		5-6/30/26		6-6/30/27	7/1/27-6/30/28		
10		Annual	Full Time	Budge	ted Salary	Budge	eted Salary	Budge	ted Salary	Budget	ed Salary	TOTAL
11	POSITION TITLE		for FTE	FTE	SALARIES	FTE	SALARIES	FTE	SALARIES	FTE	SALARIES	7/1/24-6/30/28
12	Admin/Contract Specialist	\$	55,000	0.070	\$3,850	0.070	\$3,966	0.070	\$4,045	0.070	\$4,126	\$15,986
13	Resident Services Manager II	\$	100,000	0.050	\$5,000	0.050	\$5,150	0.050	\$5,253	0.050	\$5,358	\$20,761
14	Associate Director, Senior Services	\$	115,000	0.020	\$2,300	0.020	\$2,369	0.020	\$2,416	0.020	\$2,465	\$9,550
15												
16												
17												
18												
19												
20												
21												
22	TOTALS		\$270,000	0.140	\$11,150	0.140	\$11,485	0.140	\$11,714	0.140	\$11,948	\$46,297
23		<u> </u>	φ210,000	0.140	φ11,100	0.140	ψ11,400	0.140	ψ11,714	0.140	ψ11,040	ψ 1 0,231
24												
25 26	EMPLOYEE FRINGE BENEFITS			28.0%	\$3,122	28.0%	\$3,216	28.0%	\$3,280	28.0%	\$3,346	\$12,963
27												
28	TOTAL DAS SALARIES & BENEFITS				\$14,272		\$14,700		\$14,994		\$15,294	\$59,260
29												
30	DEVELOPER MATCH POSITION TITLE											
31	Resident Services Manager I		\$90,000	1.000	\$90,000	1.000	\$92,700	1.000	\$95,481	1.000	\$98,345	\$376,526
32												
33												
34												
35												
36												
37	TOTALS		\$90,000	1.000	\$90,000	1.000	\$92,700	1.000	\$95,481	1.000	\$98,345	\$376,526
38												
39	EMPLOYEE FRINGE BENEFITS			28.0%	\$25,200	28.0%	\$25,956	28.0%	\$26,735	28.0%	\$27,537	\$105,427
40												
41	TOTAL DEVELOPER SALARIES & BENEFITS				\$115,200		\$118,656		\$122,216		\$125,882	\$481,954
42	TOTAL SALARIES & BENEFITS			1.140	\$129,472	1.140	\$133,356	1.140	\$137,210	1.140	\$141,176	\$541,214
43			I		,							,
	HSA #2											

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1						Appendix B, Page 3
2					Doo	cument Date: 3/1/2024
4	Grantee Name: Mercy Housing California					
5 6	Program Name: 345 Arguello					
7		Operat	ing Expense Det	ail		
8 9						TOTAL
	DAS EXPENDITURE CATEGORY TERM	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
11	Rental of Property					
12	Utilities(Elec, Water, Gas, Phone, Garbage)					
13	Office Supplies, Postage	\$700	\$700	\$700	\$700	\$2,800
14	Building Maintenance and Repair					
15	Printing and Reproduction					
16	Insurance					
17	Staff Training	\$700	\$700	\$700	\$700	\$2,800
18	Staff Travel (Local & Out of Town)					
19	Rental of Equipment					
20						
21	<u>CONSULTANTS</u>					
22	Consultant A					
23	Consultant B					
24	Consultant C					
25						
26	<u>OTHER</u>					
27						
28	Supplies for Monthly Community Projects & Events	\$20,403	\$21,080	\$21,544	\$22,018	\$85,045
30	Translation	\$750	\$750	\$750	\$750	\$3,000
31						
	TOTAL DAS OPERATING EXPENSE	\$22,553	\$23,230	\$23,694	\$24,168	\$93,645
33						
	DEVELOPER MATCH OPERATING EXPENSE					
35	Rental of Property					\$0
36	Utilities(Elec, Water, Gas, Phone, Garbage)					\$0
37	Office Supplies, Postage					\$0
38	Building Maintenance and Repair					\$0
39	Printing and Reproduction					\$0
40	Insurance					\$0
41	Staff Training					\$0
42	Staff Travel (Local & Out of Town)					\$0
43	Other: Wellness Nurse 0.1 FTE	\$17,366	\$17,887	\$18,424	\$18,976	\$72,653
44						
45	TOTAL DEVELOPER OPERATING EXPENSE	\$17,366	\$17,887	\$18,424	\$18,976	\$72,653
46 47	TOTAL OPERATING EXPENSE	\$39,919	\$41,117	\$42,118	\$43,144	\$166,298
48		<u> </u>	. <u></u>	<u> </u>		· · · · · ·
	HSA #3					

Appendix A – Services to be Provided Mercy Housing RAD Housing Support Services at 491 31st Avenue July 1, 2024 through June 30, 2028

I. Purpose

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of this grant is to provide support services to older adults and adults with disabilities residing in San Francisco RAD converted housing development units, and to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

Adult with a									
	A person 18 to 59 years of age living with a disability								
Disability At Risk of									
Institutionalization	To be considered at risk of institutionalization, a person must have, at a								
Institutionalization	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	Human Services Agency's Contracts Administration Reporting and Billing								
	Online (CARBON) system								
City	City and County of San Francisco, a municipal corporation								
Communities of Color	An inclusive and unifying term for persons who do not identify as White,								
	who have been historically and systemically disadvantaged by								
	institutionalized and interpersonal racism.								
DAS	Department of Disability and Aging Services								
Disability	A condition, or combination of conditions, 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	Mercy Housing								
Health and Wellness	Any service that supports and/or promotes tenants' health and well-being								
Services	(i.e. Adult Day Health, nutrition programs, free health screenings, DAS								
LODEL	services, etc.).								
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,								

II. Definitions

	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, as 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.
MOHCD	Mayor's Office of Housing and Community Development
OCM	Office of Contract Management, San Francisco Human Services Agency
OCP	Office of Community Partnerships, Department of Disability and Aging Services
Older Adult	Person who is 60 years or older, used interchangeably with "senior."
RAD	Rental Assistance Demonstration
Senior	Person who is 60 years or older, used interchangeably with "older adult."
SF-HSA	Human Services Agency of the City and County of San Francisco.
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 contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9).

III. Target Population

This program is designed to serve all ethnicities and populations in Grantee's RAD converted housing units, with focused expertise to promote the unique cultural needs which have been identified as demonstrating the greatest economic and social need:

- Persons with low income
- Persons who are socially isolated
- Persons with limited English-speaking proficiency
- Persons from communities of color
- Persons who identify as LGBTQ+
- Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be:

- An older adult, aged 60 years or over or
- An adult with a disability, aged 18-59 and
- Residing in housing units at the locations indicated below
- V. Location and Time of Services

Services will be provided at 491 31st Avenue, San Francisco, CA, 94121, Monday through Friday, during regular office hours of 8:30 a.m. to 5:30 p.m., excluding holidays. On occasion, workshops or events will be provided after hours or on weekends.

VI. Description of Services and Program Requirements

- 1. Grantee will provide four categories of services to older adults and adults with disabilities under this grant:
 - i. Outreach
 - a. Establish and maintain positive relationships with tenants.
 - b. Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.
 - c. Contact all new tenants to invite them to join community activities.
 - d. Contact, interact, inform, and invite all tenants to make use of support services to assist with and address individual needs or issues. These efforts will include a variety of outreach techniques such as written messages in appropriate languages, flyers, brochures, telephone calls, open-house events, and emails (as available).
 - ii. Service Connection
 - a. Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
 - b. Provide service needs assessment, information and referral, crisis intervention, and counseling with individuals and groups of tenants, as needed.
 - c. Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
 - d. Provide short-term case management services to tenants as needed, while working to connect those with longer-term needs to ongoing case management services.
 - e. Serve as a liaison or advocate for tenants with other service providers.
 - f. Assist tenants in identifying and accessing community services needed to meet tenant's specific needs or to make progress toward identified goals.
 - iii. Housing Stability
 - a. Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
 - b. Conduct direct outreach to all tenants who become delinquent in rent

payments, and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.

- c. Conduct direct outreach to all tenants who are experiencing safety concerns or lease/house rule violations, or who have been involved in critical incidents.
- d. Provide information on various topics that will help tenants maintain their housing; provide assistance in communicating with, responding to, and meeting with property management to help tenancies resolve issues related to housing; provide assistance in the remedy of incidences and/or lease violations that could lead to eviction by establishing written plans; and/or provide assistance with conflict resolution for tenants who need to solve problems or resolve conflicts with other tenants.
- iv. Community Engagement
 - a. Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.
 - b. Provide tenants with opportunities to participate in organized gatherings for peer support, social connections, celebrations/commemorations, and other community events held onsite.
 - c. Provide trainings and educational workshops on a variety of topics relating to health, wellness, finance, housing, and other topics.
- 2. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS|OCP policy memoranda.
- 3. Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.
- 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS|OCP. Grantee will share the survey results with DAS|OCP by March 15th each grant year, or on a mutually agreed-upon date between DAS|OCP and Grantee.
- 5. Grantee will hire, train, and supervise .14 FTE (leveraged and/or grant-funded) to provide services.
- 6. Grantee will ensure adequate and culturally-competent staffing to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all program standards. Grantee will ensure services are available in the languages of the tenant population being served.
- 7. Grantee will ensure that units of service provided are tracked and distinguishable.
- 8. Grantee will attend in-service trainings and meetings coordinated and provided by DAS|OCP, and share the information with their staff and volunteers as needed. Grantee will attend RAD-related, MOHCD, and other meetings as needed.
- 9. Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- 10. Grantee is a mandated reporter for witnessed or suspected elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- 11. Grantee will communicate and collaborate regularly with DAS to help provide logistical and operational support to the program, to provide quality services to tenants, and to strategize program direction and services provision.

VII. Service Objectives

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

- Grantee will have individual and group service encounters with at least 65% of unduplicated tenants per month.
- Grantee will provide tenants with a minimum of two (2) activities or events per week (or 104 annually). Types of activities annually must be at least 10% trainings/workshops, 25% health- and wellness-related, and 65% all other.
- All (100%) of households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will provide services to 100% of unduplicated tenants annually. Services can be individual services, community activities, and/or outreach.

VIII. Outcome Objectives

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

- Tenants will feel connected to and involved with their tenant/resident community. At least 50% of unduplicated residents participating in the annual survey will feel "strongly" or "very strongly" about being connected to and involved with their tenant/resident community.
 - Grantee will use the following standardized question: How strongly do you feel connected to and involved with the tenant/resident community at [site]? The options to answer should be "very strongly," "strongly," "somewhat," and "not at all."
- Tenants will have better access to resources improving their health and wellness. At least 50% of unduplicated tenants participating in the annual survey will "agree" or "highly agree" that they have better access to resources that improve their health and wellness.
 - Grantee will use the following standardized question: Do you have better access to resources that increase your health and wellness? The options to answer should be "highly agree," "agree," "neutral," "disagree," and "highly disagree."
- Tenants will have stable housing. At least 95% of households will have obtained and/or maintained reliable, secure, and stable housing that meets the needs of individuals and households.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers into the grantee's database, using a DAS|OCP-approved intake form.

- 2. Annual and monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
 - a. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VIII (Outcome Objectives). This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th day of the month following the end of the program year.
 - i. Number and percentage of unduplicated tenants to whom services were provided annually.
 - ii. Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "strongly" or "very strongly" when asked about being connected to and involved with their tenant/resident community.
 - iii. Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "agree" or "highly agree" when asked about having better access to resources that improve their health and wellness.
 - iv. Number and percentage of households that have obtained and/or maintained stable housing.
 - b. Grantee will provide a monthly report of activities, referencing the tasks as described in Section VII (Service Objectives). Grantee will enter the monthly metrics in the CARBON database by the 15th day of the following month.
 - i. Number and percentage of unduplicated tenants with individual and group service encounters.
 - ii. Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - iii. Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- 3. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed-upon date between DAS|OCP and the Grantee.
- 4. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and a Security Awareness Training on an annual basis. The Grantee will maintain evidence of staff completion of these trainings.
- 5. Grantee will issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The Grantee must submit the report in CARBON.
- 6. Grantee will develop and deliver ad hoc reports as requested by SF-HSA, DAS, and

6 of 8

OCP.

- 7. Grantee will develop and deliver a bi-annual summary report of SOGI data collected as required by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10 (June-December data) and July 10 (January-June data).
- 8. Grantee will maintain an updated site chart, using the DAS|OCP approved form, with details about the program.
- 9. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable, and will take all reasonable efforts to implement HIPAA requirements.
- 10. Grantee will develop a grievance policy consistent with DAS|OCP policy memorandum.

For assistance with reporting requirements or submission of reports, contact:

Rocio Duenas Rocio.Duenas@sfgov.org Principal Contract Manager, Office of Contract Management Human Services Agency

or

Rosemarie Tocchini Rosemarie.Tocchini@sfgov.org Program Analyst, Office of Community Partnerships Department of Disability and Aging Services

X. Monitoring Activities

A. <u>Program Monitoring</u>: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates; backup documentation for the units of service and all reporting; progress of service and outcome objectives; the methods by which participant records are collected and maintained; reporting performance; maintenance of service unit logs; agency and organization standards, including a current organizational chart and evidence of provision of annual training to staff in Elder Abuse Prevention and Reporting and Security Awareness; review of program operation, including a review of a written policies-and-procedures manual of all OCP-funded programs; written project income polices if applicable; grievance procedure (must be posted in the center/office and distributed to those consumers who are homebound); site chart with current hours of operation; a board of director list; whether services are provided appropriately according to sections VII (Service Objectives) and VIII (Outcome Objectives); logs of service units based on hours of scheduled activities; sign-in sheets of consumers participating in each activity; and documentation showing the reported units of service are based on scheduled activities at the site.

B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, the quarterly balance sheet, the 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 the Personnel Manual, the Emergency Operations Plan, compliance with the Americans with Disabilities Act, subcontracts, MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

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1						pendix B, Page 1
2						nent Date: 3/1/202
3	HUMA	AN SERVICES AG		ACT BUDGET SU	MMARY	
4			BY PROGRAM			
-				0 I T		
5	Grantee Name:			Grant Term:		
6	Mercy Housing Californi	а		July 1, 2024 - June 3	80, 2028	
7	(Check One) New X Renewal	Modification				
8	If modification, Effective Date of Mod.	No. of Mod.				
9	Program: 491 31st Avenue (RAD Seniors)					
	Budget Reference Page No.(s)					TOTAL
	Program Term	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
12	· · · · · · · · ·					
	Salaries & Benefits	\$14,272	\$14,700		\$15,294	\$59,26
	Operating Expense	\$24,170	\$24,895	\$25,393	\$25,900	\$100,35
	Capital Expenditure Subtotal	\$38,442	\$39,595	\$40,387	\$41,194	\$ \$159,61
-	Indirect Percentage (%) (max. 15%)					
•••		15%	15%		15%	15
	Indirect Cost (Line 16 X Line 17)	\$5,766	\$5,939	\$6,058	\$6,179	\$23,94
	Total DAS Expenditures	\$44,208	\$45,534	\$46,445	\$47,373	\$183,56
20			* ***	* • • • • • •		****
	Salaries & Benefits	\$89,600	\$92,288	\$95,057	\$97,908	\$374,85
	Operating Expense	\$0	\$0	\$0	\$0	\$
	Capital Expenditure	\$0	\$0	\$0	\$0	\$
	Subtotal	\$89,600	\$92,288	\$95,057	\$97,908	\$374,85
	Indirect Percentage (%)	10%	10%		10%	10
26	Indirect Cost (Line 16 X Line 17)	\$8,960	\$9,229	\$9,506	\$9,791	\$37,48
	Total Developer Expenditures	\$98,560	\$101,517	\$104,562	\$107,699	\$412,33
28						
29	Total DAS and Developer Expenditures	\$142,768	\$147,051	\$151,008	\$155,072	\$595,89
30	DAS Revenues					
31	Local General Fund	\$44,208	\$45,534	\$46,445	\$47,373	\$183,56
32						
33						
34						
35 36						
30 37						
38						
		\$11,000	<i>Ф</i> (Г С О ()	\$40.445	¢ 47.070	\$100.50
39		\$44,208	\$45,534	\$46,445	\$47,373	\$183,56
40	Developer Revenues	\$00.500		\$404 500	# 407.000	\$ 440.00
41	Developer Match Funds	\$98,560	\$101,517	\$104,562	\$107,699	\$412,33
12 13						
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	Total Developer Revenues	\$98,560	\$101,517	\$104,562	\$107,699	\$412,33
		1				
ŧÖ	Total Revenues	\$142,768	\$147,051	\$151,008	\$155,072	\$595,89
17	Full Time Equivalent (FTE)					
19	Prepared by:		Telephone No.			Date:
						2010.
50	HSA-CO Review Signature:					
	HSA #1					

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2											Docume	ent Date: 3/1/2024
4	Grantee Name: Mercy Housing California											
	Program Name: 491 31st Avenue											
6					Coloriaa 9 E	Donofito	Detail					
7 Salaries & Benefits Detail												
9	DAS SALARIES & BENEFITS				4-6/30/25		5-6/30/26		6-6/30/27	7/1/27-6/30/28		
10		Annua	al Full Time	Budge	ted Salary	Budge	eted Salary	Budge	ted Salary	Budget	ed Salary	TOTAL
11	POSITION TITLE		ry for FTE	FTE	SALARIES	FTE	SALARIES	FTE	SALARIES	FTE	SALARIES	7/1/24-6/30/28
12	Admin/Contract Specialist	\$	55,000	0.070	\$3,850	0.070	\$3,966	0.070	\$4,045	0.070	\$4,126	\$15,986
13	Resident Services Manager II	\$	100,000	0.050	\$5,000	0.050	\$5,150	0.050	\$5,253	0.050	\$5,358	\$20,761
14	Associate Director, Senior Services	\$	115,000	0.020	\$2,300	0.020	\$2,369	0.020	\$2,416	0.020	\$2,465	\$9,550
15												
16												
17												
18												
19												
20												
21												
22	TOTALS		\$270,000	0.140	\$11,150	0.140	\$11,485	0.140	\$11,714	0.140	\$11,948	\$46,297
23			<i>\</i> 2.0,000	01110	¢11,100	0.110	¢11,100	0.110	\$ 11,711	0.110	¢11,010	¢ :0,201
24												
25 26	EMPLOYEE FRINGE BENEFITS			28.0%	\$3,122	28.0%	\$3,216	28.0%	\$3,280	28.0%	\$3,346	\$12,963
27												
28	TOTAL DAS SALARIES & BENEFITS				\$14,272		\$14,700		\$14,994		\$15,294	\$59,260
29												
30	DEVELOPER MATCH POSITION TITLE											
31	Resident Services Coordinator II		\$70,000	1.000	\$70,000	1.000	\$72,100	1.000	\$74,263	1.000	\$76,491	\$292,854
32		<u> </u>										\$0
33		ļ										\$0
34		ļ										\$0
35		ļ										\$0
36		<u> </u>										\$0
37	TOTALS	<u> </u>	\$70,000	1.000	\$70,000	1.000	\$72,100	1.000	\$74,263	1.000	\$76,491	\$292,854
38											[]	
39	EMPLOYEE FRINGE BENEFITS			28.0%	\$19,600	28.0%	\$20,188	28.0%	\$20,794	28.0%	\$21,417	\$81,999
40				-								
41	TOTAL DEVELOPER SALARIES & BENEFITS				\$89,600		\$92,288		\$95,057		\$97,908	\$374,853
42	TOTAL SALARIES & BENEFITS			1.140	\$103,872	1.140	\$106,988	1.140	\$110,051	1.140	\$113,202	\$434,113
43												
44	HSA #2											

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1		· · · · · ·				Appendix B, Page 3
2					Doc	ument Date: 3/1/2024
4	Grantee Name: Mercy Housing California					
5 6	Program Name: 491 31st Avenue					
7		Operati	ing Expense Deta	ail		
8 9						TOTAL
	DAS EXPENDITURE CATEGORY TERM	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
11	Rental of Property					
12	Utilities(Elec, Water, Gas, Phone, Garbage)					
13	Office Supplies, Postage	\$1,000	\$1,000	\$1,000	\$1,000	\$4,000
14	Building Maintenance and Repair					
15	Printing and Reproduction					
16	Insurance					
17	Staff Training	\$1,000	\$1,000	\$1,000	\$1,000	\$4,000
	Staff Travel (Local & Out of Town)	\$400	\$400	\$400	\$400	\$1,600
19	Rental of Equipment					
20						
21	<u>CONSULTANTS</u>					
22	Consultant A					
23	Consultant B					
24	Consultant C					
25						
26	<u>OTHER</u>					
27	Supplies for Monthly Community Projects &					
	Events	\$20,270	\$20,995	\$21,493	\$22,000	\$84,758
30 31	Translation	\$1,500	\$1,500	\$1,500	\$1,500	\$6,000
	TOTAL DAS OPERATING EXPENSE	\$24,170	\$24,895	\$25,393	\$25,900	\$100,358
33						
34	DEVELOPER MATCH OPERATING EXPENSE					
	Rental of Property					\$0
	Utilities(Elec, Water, Gas, Phone, Garbage)					\$0
	Office Supplies, Postage					\$0
	Building Maintenance and Repair					\$0
	Printing and Reproduction					\$0
	Insurance					\$0
	Staff Training					\$0
	Staff Travel (Local & Out of Town)					\$0
	Rental of Equipment					\$0
44						
	TOTAL DEVELOPER OPERATING EXPENSE	\$0	\$0_	\$0	\$0	\$0
	TOTAL OPERATING EXPENSE	\$24,170	\$24,895	\$25,393	\$25,900	\$100,358
49	HSA #3					

Appendix A – Services to be Provided Mercy Housing RAD Housing Support Services at JFK Towers (2451 Sacramento Street) July 1, 2024 through June 30, 2028

I. Purpose

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of this grant is to provide support services to older adults and adults with disabilities residing in San Francisco RAD converted housing development units, and to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

Adult with a	A person 18 to 59 years of age living with a disability
Disability	
At Risk of	To be considered at risk of institutionalization, a person must have, at a
Institutionalization	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	Human Services Agency's Contracts Administration Reporting and Billing
	Online (CARBON) system
City	City and County of San Francisco, a municipal corporation
Communities of Color	An inclusive and unifying term for persons who do not identify as White,
	who have been historically and systemically disadvantaged by
	institutionalized and interpersonal racism.
DAS	Department of Disability and Aging Services
Disability	A condition, or combination of conditions, 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	Mercy Housing
Health and Wellness	Any service that supports and/or promotes tenants' health and well-being
Services	(i.e. Adult Day Health, nutrition programs, free health screenings, DAS
	services, etc.).
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

II. Definitions

	assigned at birth. This includes, but is not limited to, lesbian, gay, bisexual,
	transgender, genderqueer, and gender nonbinary.
Limited English-	Any person who does not speak English well or is otherwise unable to
Speaking Proficiency	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, as 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.
MOHCD	Mayor's Office of Housing and Community Development
OCM	Office of Contract Management, San Francisco Human Services Agency
OCP	Office of Community Partnerships, Department of Disability and Aging
	Services
Older Adult	Person who is 60 years or older, used interchangeably with "senior."
RAD	Rental Assistance Demonstration
Senior	Person who is 60 years or older, used interchangeably with "older adult."
SF-HSA	Human Services Agency of the City and County of San Francisco.
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
	contractors that provide health care and social services to seek to collect and
	analyze data concerning the sexual orientation and gender identity of the
	clients they serve (Chapter 104, Sections 104.1 through 104.9).

III. Target Population

This program is designed to serve all ethnicities and populations in Grantee's RAD converted housing units, with focused expertise to promote the unique cultural needs which have been identified as demonstrating the greatest economic and social need:

- Persons with low income
- Persons who are socially isolated
- Persons with limited English-speaking proficiency
- Persons from communities of color
- Persons who identify as LGBTQ+
- Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be:

- An older adult, aged 60 years or over or
- An adult with a disability, aged 18-59 and
- Residing in housing units at the locations indicated below

V. Location and Time of Services

Services will be provided at JFK Towers (2451 Sacramento Street, San Francisco, CA, 94115, Monday through Friday, during regular office hours of 8:30 a.m. to 5:30 p.m., excluding holidays. On occasion, workshops or events will be provided after hours or on weekends.

VI. Description of Services and Program Requirements

- 1. Grantee will provide four categories of services to older adults and adults with disabilities under this grant:
 - i. Outreach
 - a. Establish and maintain positive relationships with tenants.
 - b. Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.
 - c. Contact all new tenants to invite them to join community activities.
 - d. Contact, interact, inform, and invite all tenants to make use of support services to assist with and address individual needs or issues. These efforts will include a variety of outreach techniques such as written messages in appropriate languages, flyers, brochures, telephone calls, open-house events, and emails (as available).
 - ii. Service Connection
 - a. Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
 - b. Provide service needs assessment, information and referral, crisis intervention, and counseling with individuals and groups of tenants, as needed.
 - c. Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
 - d. Provide short-term case management services to tenants as needed, while working to connect those with longer-term needs to ongoing case management services.
 - e. Serve as a liaison or advocate for tenants with other service providers.
 - f. Assist tenants in identifying and accessing community services needed to meet tenant's specific needs or to make progress toward identified goals.
 - iii. Housing Stability
 - a. Work cooperatively and as part of a team with property management staff to meet the needs of tenants.

- b. Conduct direct outreach to all tenants who become delinquent in rent payments, and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- c. Conduct direct outreach to all tenants who are experiencing safety concerns or lease/house rule violations, or who have been involved in critical incidents.
- d. Provide information on various topics that will help tenants maintain their housing; provide assistance in communicating with, responding to, and meeting with property management to help tenancies resolve issues related to housing; provide assistance in the remedy of incidences and/or lease violations that could lead to eviction by establishing written plans; and/or provide assistance with conflict resolution for tenants who need to solve problems or resolve conflicts with other tenants.
- iv. Community Engagement
 - a. Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.
 - b. Provide tenants with opportunities to participate in organized gatherings for peer support, social connections, celebrations/commemorations, and other community events held onsite.
 - c. Provide trainings and educational workshops on a variety of topics relating to health, wellness, finance, housing, and other topics.
- 2. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS|OCP policy memoranda.
- 3. Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.
- 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS|OCP. Grantee will share the survey results with DAS|OCP by March 15th each grant year, or on a mutually agreed-upon date between DAS|OCP and Grantee.
- 5. Grantee will hire, train, and supervise .44 FTE (leveraged and/or grant-funded) to provide services.
- 6. Grantee will ensure adequate and culturally-competent staffing to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all program standards. Grantee will ensure services are available in the languages of the tenant population being served.
- 7. Grantee will ensure that units of service provided are tracked and distinguishable.
- 8. Grantee will attend in-service trainings and meetings coordinated and provided by DAS|OCP, and share the information with their staff and volunteers as needed. Grantee will attend RAD-related, MOHCD, and other meetings as needed.
- 9. Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- 10. Grantee is a mandated reporter for witnessed or suspected elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- 11. Grantee will communicate and collaborate regularly with DAS to help provide logistical and operational support to the program, to provide quality services to tenants, and to strategize program direction and services provision.

VII. Service Objectives

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

- Grantee will have individual and group service encounters with at least 65% of unduplicated tenants per month.
- Grantee will provide tenants with a minimum of two (2) activities or events per week (or 104 annually). Types of activities annually must be at least 10% trainings/workshops, 25% health- and wellness-related, and 65% all other.
- All (100%) of households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will provide services to 100% of unduplicated tenants annually. Services can be individual services, community activities, and/or outreach.

VIII. Outcome Objectives

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

- Tenants will feel connected to and involved with their tenant/resident community. At least 50% of unduplicated residents participating in the annual survey will feel "strongly" or "very strongly" about being connected to and involved with their tenant/resident community.
 - Grantee will use the following standardized question: How strongly do you feel connected to and involved with the tenant/resident community at [site]? The options to answer should be "very strongly," "strongly," "somewhat," and "not at all."
- Tenants will have better access to resources improving their health and wellness. At least 50% of unduplicated tenants participating in the annual survey will "agree" or "highly agree" that they have better access to resources that improve their health and wellness.
 - Grantee will use the following standardized question: Do you have better access to resources that increase your health and wellness? The options to answer should be "highly agree," "agree," "neutral," "disagree," and "highly disagree."
- Tenants will have stable housing. At least 95% of households will have obtained and/or maintained reliable, secure, and stable housing that meets the needs of individuals and households.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers into the grantee's

database, using a DAS|OCP-approved intake form.

- 2. Annual and monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
 - a. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VIII (Outcome Objectives). This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th day of the month following the end of the program year.
 - i. Number and percentage of unduplicated tenants to whom services were provided annually.
 - ii. Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "strongly" or "very strongly" when asked about being connected to and involved with their tenant/resident community.
 - iii. Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "agree" or "highly agree" when asked about having better access to resources that improve their health and wellness.
 - iv. Number and percentage of households that have obtained and/or maintained stable housing.
 - b. Grantee will provide a monthly report of activities, referencing the tasks as described in Section VII (Service Objectives). Grantee will enter the monthly metrics in the CARBON database by the 15th day of the following month.
 - i. Number and percentage of unduplicated tenants with individual and group service encounters.
 - ii. Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - iii. Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- 3. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed-upon date between DAS|OCP and the Grantee.
- 4. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and a Security Awareness Training on an annual basis. The Grantee will maintain evidence of staff completion of these trainings.
- 5. Grantee will issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The Grantee must submit the report in CARBON.

- 6. Grantee will develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
- 7. Grantee will develop and deliver a bi-annual summary report of SOGI data collected as required by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10 (June-December data) and July 10 (January-June data).
- 8. Grantee will maintain an updated site chart, using the DAS|OCP approved form, with details about the program.
- 9. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable, and will take all reasonable efforts to implement HIPAA requirements.
- 10. Grantee will develop a grievance policy consistent with DAS|OCP policy memorandum.

For assistance with reporting requirements or submission of reports, contact:

Rocio Duenas Rocio.Duenas@sfgov.org Principal Contract Manager, Office of Contract Management Human Services Agency

or

Rosemarie Tocchini Rosemarie.Tocchini@sfgov.org Program Analyst, Office of Community Partnerships Department of Disability and Aging Services

X. Monitoring Activities

A. <u>Program Monitoring</u>: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates; backup documentation for the units of service and all reporting; progress of service and outcome objectives; the methods by which participant records are collected and maintained; reporting performance; maintenance of service unit logs; agency and organization standards, including a current organizational chart and evidence of provision of annual training to staff in Elder Abuse Prevention and Reporting and Security Awareness; review of program operation, including a review of a written policies-and-procedures manual of all OCP-funded programs; written project income polices if applicable; grievance procedure (must be posted in the center/office and distributed to those consumers who are homebound); site chart with current hours of operation; a board of director list; whether services are provided appropriately according to sections VII (Service Objectives) and VIII (Outcome Objectives); logs of service units based on hours of scheduled activities; sign-in sheets of consumers participating in each activity; and documentation showing the reported units of service are based on scheduled activities at the site.

B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, the quarterly balance sheet, the 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 the Personnel Manual, the Emergency Operations Plan, compliance with the Americans with Disabilities Act, subcontracts, MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

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1 2					nent Date: 3/1/2024							
					10111 Duto: 0/ 1/202							
	MAN SERVICES AG		ACT BUDGET SU									
4		BY PROGRAM										
5 Grantee Name:			Grant Term:									
6 Mercy Housing Califor	Mercy Housing California July 1, 2024 - June 30, 2028											
7 (Check One) New X Renewal	(Check One) New X Renewal Modification											
8 If modification, Effective Date of Mod.	If modification, Effective Date of Mod. No. of Mod.											
9 Program: JFK Towers (RAD Seniors)												
					TOTAL							
10 Budget Reference Page No.(s) 11 Program Term	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							
12 DAS Expenditures	1/1/24-0/30/23	111/25-0/50/20	111/20-0/30/21	1/1/2/-0/30/20	1/1/24-0/30/20							
13 Salaries & Benefits	\$42,432	\$43,705	\$44,579	\$45,471	\$176,187							
14 Operating Expense	\$28,576	\$29,433		\$30,622	\$118,653							
15 Capital Expenditure	¢_0,0.0	<i> </i>	<i> </i>	<i> </i>	\$0							
16 Subtotal	\$71,008	\$73,138	\$74,601	\$76,093	\$294,840							
17 Indirect Percentage (%) (max. 15%)	15%	15%	15%	15%	15%							
18 Indirect Cost (Line 16 X Line 17)	\$10,651	\$10,971	\$11,190	\$11,414	\$44,226							
19 Total DAS Expenditures	\$81,659	\$84,109	\$85,791	\$87,507	\$339,066							
20 Developer Match Expenditures	\$01,000	<i>v</i> 0 1,100	¢00,101	<i>voi</i> , v <i>oi</i>	+000,000							
21 Salaries & Benefits	\$67,200	\$69,216	\$71,292	\$73,431	\$281,140							
22 Operating Expense	\$60,781	\$62,604	\$66,482	\$66,417	\$256,284							
		. ,	. ,									
23 Capital Expenditure 24 Subtotal	\$0 \$127,981	\$0	\$0 \$137,774	\$0 \$139,848	\$0 \$537,424							
25 Indirect Percentage (%)		· · ·										
	10%	10%	10%	10%	10%							
26 Indirect Cost (Line 16 X Line 17)	\$12,798	\$13,182	\$13,777	\$13,985	\$53,742							
27 Total Developer Expenditures	\$140,779	\$145,002	\$151,552	\$153,833	\$591,166							
28												
29 Total DAS and Developer Expenditures	\$222,438	\$229,111	\$237,343	\$241,340	\$930,232							
30 DAS Revenues												
31 Local General Fund	\$81,659	\$84,109	\$85,791	\$87,507	\$339,066							
32												
33												
34 35												
36												
37												
38												
39 TOTAL DAS REVENUES	\$81,659	\$84,109	\$85,791	\$87,507	\$339,066							
40 Developer Revenues	φ01,000	φ04,100	\$00,701	<i>401</i> ,001	4000,000							
41 Developer Match Funds	\$140,779	\$145,002	\$151,552	\$153,833	\$591,166							
42	φ140,110	φ140,002	φ101,002	φ100,000	<i>\\</i> 001,100							
43												
44												
45 Total Developer Revenues	\$140,779	\$145,002	\$151,552	\$153,833	\$591,166							
46 Total Revenues	\$222,438	\$229,111	\$237,343	\$241,340	\$930,232							
47 Full Time Equivalent (FTE)	. ,	,	,									
49 Prepared by:		Telephone No.			Date:							
50 HSA-CO Review Signature:												
51 HSA #1												

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2											Docume	ent Date: 3/1/2024
	Grantee Name: Mercy Housing California											
5	Program Name: JFK Towers											
6												
7					Salaries & E	Benefits	Detail					
8 9	DAS SALARIES & BENEFITS			7/1/2/	-6/30/25	7/1/2	5-6/30/26	7/1/26	-6/30/27	7/1/27	7-6/30/28	
10	DAG GALARIEG & DEREI IIG				ted Salary		eted Salary		ted Salary		ted Salary	TOTAL
11	POSITION TITLE		al Full Time ry for FTE	FTE	SALARIES	ETE	SALARIES	FTE	SALARIES	ETE	SALARIES	7/1/24-6/30/28
11			-			FTE				FTE		
	Resident Services Coordinator II	\$	70,000	0.250	\$17,500	0.250	\$18,025	0.250	\$18,386	0.250	\$18,753	\$72,664
13	Resident Services Manager I	\$	90,000	0.050	\$4,500	0.050	\$4,635	0.050	\$4,728	0.050	\$4,822	\$18,685
14	Admin/Contract Specialist	\$	55,000	0.070	\$3,850	0.070	\$3,966	0.070	\$4,045	0.070	\$4,126	\$15,986
15	Resident Services Manager II	\$	100,000	0.050	\$5,000	0.050	\$5,150	0.050	\$5,253	0.050	\$5,358	\$20,761
16	Associate Director, Senior Services	\$	115,000	0.020	\$2,300	0.020	\$2,369	0.020	\$2,416	0.020	\$2,465	\$9,550
17												
18												
19												
20												
21												
			¢420.000	0.440	¢00.450	0.440	¢04.445	0.440	¢04.007	0.440	¢25 504	¢407.040
22 23	TOTALS		\$430,000	0.440	\$33,150	0.440	\$34,145	0.440	\$34,827	0.440	\$35,524	\$137,646
24												
	EMPLOYEE FRINGE BENEFITS			28.0%	\$9,282	28.0%	\$9,560	28.0%	\$9,752	28.0%	\$9,947	\$38,541
26 27												
	TOTAL DAS SALARIES & BENEFITS				\$42,432		\$43,705		\$44,579		\$45,471	\$176,187
29			l		¥, .*_		<i>¥</i> .0,		¥ 1 1,01 0			* 110,101
30	DEVELOPER MATCH POSITION TITLE											
			#70.000	0.750	\$50,500	0.750	<i>6</i>54075	0.750	AFF 007	0.750	* 57.000	* 010.010
	Resident Services Coordinator II		\$70,000	0.750	\$52,500	0.750	\$54,075	0.750	\$55,697	0.750	\$57,368	\$219,640
32		<u> </u>										\$0
33												\$0
34												\$0
35												\$0
36												\$0
37	TOTALS		\$70,000	0.750	\$52,500	0.750	\$54,075	0.750	\$55,697	0.750	\$57,368	\$219,640
38			i								1	
39	EMPLOYEE FRINGE BENEFITS			28.0%	\$14,700	28.0%	\$15,141	28.0%	\$15,595	28.0%	\$16,063	\$61,499
40												
41	TOTAL DEVELOPER SALARIES & BENEFITS				\$67,200		\$69,216		\$71,292		\$73,431	\$281,140
42	TOTAL SALARIES & BENEFITS			1.190	\$109,632	1.190	\$112,921	1.190	\$115,872	1.190	\$118,902	\$457,326
43			I						,	-		
	HSA #2											

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1			<u> </u>		• • • • •	Appendix B, Page 3
2	-				Doc	ument Date: 3/1/2024
4	Grantee Name: Mercy Housing California					
5 6	Program Name: JFK Towers					
7		Operat	ing Expense Det	ail		
8 9	-					TOTAL
	DAS EXPENDITURE CATEGORY TERM	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
11	Rental of Property					
12	Utilities(Elec, Water, Gas, Phone, Garbage)					
13	Office Supplies, Postage	\$1,000	\$1,000	\$1,000	\$1,000	\$4,000
14	Building Maintenance and Repair					
15	Printing and Reproduction					
16	Insurance					
17	Staff Training	\$1,000	\$1,000	\$1,000	\$1,000	\$4,000
	Staff Travel (Local & Out of Town)	\$400	\$400	\$400	\$400	\$1,600
19	Rental of Equipment					
20						
21	<u>CONSULTANTS</u>					
22	Consultant A					
23	Consultant B					
24	Consultant C					
25						
26	OTHER					
27	Supplies for Monthly Community Draigate 8					
28	Supplies for Monthly Community Projects & Events	\$23,176	\$23,533	\$23,822	\$24,222	\$94,753
30	Translation	\$3,000	\$3,500	\$3,800	\$4,000	\$14,300
31						
	TOTAL DAS OPERATING EXPENSE	\$28,576	\$29,433	\$30,022	\$30,622	\$118,653
33						
	DEVELOPER MATCH OPERATING EXPENSE					
	Rental of Property					\$0
	Utilities(Elec, Water, Gas, Phone, Garbage)					\$0
	Office Supplies, Postage					\$0
	Building Maintenance and Repair					\$0
	Printing and Reproduction					\$0
	Insurance					\$0
	Staff Training					\$0
	Staff Travel (Local & Out of Town)					\$0
	Other: Wellness Nurse 0.35 FTE	\$60,781	\$62,604	\$66,482	\$66,417	\$256,284
44	4					
45 46	TOTAL DEVELOPER OPERATING EXPENSE	\$60,781	\$62,604	\$66,482	\$66,417	\$256,284
40	TOTAL OPERATING EXPENSE	\$89,357	\$92,037	\$96,504	\$97,039	\$374,937
48						

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APPENDIX F - SITE CHART

Date: March 1, 2024

Agency: Mercy Housing California

Contract Mailing Address: 1256 Market Street San Francisco, CA. 94102

Director: Samantha Hogg

Program: Resident Services

Program Manager: Jennifer Fu

Fiscal Year: 2024-2028

Phone Number: 415-355-7100

Phone Number: 415-355-7100

P						-
<u>SITES</u> : Name of Site	345 Arguello	491 31st Avenue	1760 Bush	1880 Pine	JFK Towers	2698 California
Address and Zip	345 Arguello, SF, 94118	491 31st Ave. SF, 94121	1760 Bush St. SF, 94109	1880 Pine St. SF, 94115	2451 Sacramento St. SF, 94115	2698 California St. SF, 94115
Phone Number	415-702-3991	415-742-0681	415-529-2641	415-345-1909	415-477-7035	415-813-3680
Fax Number	415-752-2691	415-742-5772	415-872-7682	415-345-1922	415-928-1726	415-929-6949
Neighborhood	Jordan Park	Richmond District	Japantown	Pacific Heights	Pacific Heights	Pacific Heights
Supervisorial District No.	District 2	District 1	District 5	District 2	District 2	District 2
Bus Line #	38, 1, 38-L	38,1, 38-L	1,2	1,2	1,2,22	1,2,24
Person in Charge	Jennifer Fu	Jennifer Fu	Jennifer Fu	Jennifer Fu	Jennifer Fu	John Ryan/Jennifer Fu
Site Manager/Coordinator	Anthony Eldridge	Anthony Eldridge	Marion Lopez/Florence Lau	Cathrine Payumo	Gloria Taylor	Cathrine Payumo
Additional Programs Offered at Site	Wellness Nurse	Wellness Nurse	Wellness Nurse	Wellness Nurse	Wellness Nurse	Wellness Nurse
	<u>X</u> Mon <u>X</u> Tues <u>X</u> Wed	<u>X</u> Mon <u>X</u> Tues <u>X</u> Wed	<u>X_Mon_X_</u> Tues <u>X_</u> Wed	X_Mon_X_Tues_X_Wed	<u>X</u> Mon <u>X</u> Tues <u>X</u> Wed	X_Mon_X_Tues_X_Wed
Business Days	<u>X</u> Thurs <u>X</u> Fri	<u>X</u> Thurs <u>X</u> Fri	<u>X</u> Thurs <u>X</u> Fri	<u>X</u> Thurs <u>X</u> Fri	<u>X</u> Thurs <u>X</u> Fri	<u>X</u> Thurs <u>X</u> Fri
	SatSun	SatSun	SatSun	SatSun	SatSun	SatSun
Business Hours	8:30am - 5:30pm	8:30am - 5:30pm	8:30am - 5:30pm	8:30am - 5:30pm	8:30am - 5:30pm	8:30am - 5:30pm
	9 am - 5:30 pm M-Th and Fridays, 9 am - 2:30 pm	9 am - 5:30 pm M-Th and Fridays, 9 a.m 2:30 pm	8:30 am - 5:00 pm M-TH and Fridays, 8:30 am - 2:00 pm (Marion Lopez, full-time) 8:30 am - 5 pm T & W and Fridays, 8:30 am- 1:30 pm (Florence Lau, part-time)		8:15 am - 4:45 pm M-Th and Fridays, 8:15 - 1:45 pm	8:00 am - 4:30 pm M-Th and Fridays, 8 am - 1:30 pm
Total number of Service Days in FY	245	245	245	245	245	245
Number of Service Days Closed	16	16	16	16	16	16
Days Closed (list holidays closed)	1/15/2024 (MLK Day) 2/19/2024 (President's Day) 5/27/2024 (Memorial Day) 6/19/2024 (Juneteenth) 7/4/2024 (Independence Day) 9/2/224 (Labor Day) 11/11/2024 (Veteran's Day) 11/28/2024 (Thanksgiving Day) 11/29/2024 (Day After Thanksgiving Day) 12/25-12/31/2024 (Winter	1/15/2024 (MLK Day) 2/19/2024 (President's Day) 5/27/2024 (Memorial Day) 6/19/2024 (Juneteenth) 7/4/2024 (Independence Day) 9/2/224 (Labor Day) 11/11/2024 (Veteran's Day) 11/28/2024 (Thanksgiving Day) 11/29/2024 (Day After Thanksgiving Day) 12/25-12/31/2024 (Winter	5/27/2024 (Memorial Day) 6/19/2024 (Juneteenth) 7/4/2024 (Independence Day) 9/2/224 (Labor Day) 11/11/2024 (Veteran's Day) 11/28/2024 (Thanksgiving Day) 11/29/2024 (Day After Thanksgiving Day) 12/25-12/31/2024 (Winter	1/1/2024 (New Year's Day) 1/15/2024 (MLK Day) 2/19/2024 (President's Day) 5/27/2024 (Memorial Day) 6/19/2024 (Juneteenth) 7/4/2024 (Independence Day) 9/2/224 (Labor Day) 11/11/2024 (Veteran's Day) 11/12/2024 (Thanksgiving Day) 11/29/2024 (Day After Thanksgiving Day) 12/25-12/31/2024 (Winter Holiday Break)	6/19/2024 (Juneteenth) 7/4/2024 (Independence Day) 9/2/224 (Labor Day) 11/11/2024 (Veteran's Day) 11/28/2024 (Thanksgiving	1/1/2024 (New Year's Day) 1/15/2024 (MLK Day) 2/19/2024 (President's Day) 5/27/2024 (Memorial Day) 6/19/2024 (Juneteenth) 7/4/2024 (Independence Day) 9/2/224 (Labor Day) 11/11/2024 (Veteran's Day) 11/12/2024 (Thanksgiving Day) 11/29/2024 (Day After Thanksgiving Day) 12/25-12/31/2024 (Winter Holiday Break)
ADA Accessible	X Yes No	X Yes No	X Yes No	X Yes No	X Yes No	X Yes No

Appendix A – Services to be Provided Tenderloin Neighborhood Development Corporation RAD Housing Support Services at 320 and 330 Clementina Street July 1, 2024 through June 30, 2028

I. Purpose

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of this grant is to provide support services to older adults and adults with disabilities residing in San Francisco RAD converted housing development units, and to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

Adult with a DisabilityA person 18 to 59 years of age living with a disabilityAt Risk of InstitutionalizationTo 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, tolieting, 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.CARBONHuman Services Agency's Contracts Administration Reporting and Billing Online (CARBON) systemCityCity and County of San Francisco, a municipal corporationCommunities of ColorAn inclusive and unifying term for persons who do not identify as White, who have been historically and systemically disadvantaged by institutionalized and interpersonal racism.DASDepartment of Disability and Aging ServicesDisabilityA condition, or combination of conditions, attributable to a mental, cognitive, or physical impairment, including hearing and visual impairments, that results in substantial functional linitations 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.GranteeTenderloin Neighborhood Development CorporationHealth and W		
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capacity for independent living and self-direction; c) cognitive functioning and emotional adjustment.GranteeTenderloin Neighborhood Development CorporationHealth and Wellness ServicesAny service that supports and/or promotes tenants' health and well-being (i.e. Adult Day Health, nutrition programs, free health screenings, DAS services, etc.).LGBTQ+An acronym/term used to refer to persons who self-identify as non-		
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Services(i.e. Adult Day Health, nutrition programs, free health screenings, DAS services, etc.).LGBTQ+An acronym/term used to refer to persons who self-identify as non-	Grantee	5
Services(i.e. Adult Day Health, nutrition programs, free health screenings, DAS services, etc.).LGBTQ+An acronym/term used to refer to persons who self-identify as non-	Health and Wellness	Any service that supports and/or promotes tenants' health and well-being
services, etc.). LGBTQ+ An acronym/term used to refer to persons who self-identify as non-	Services	
	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

II. Definitions

	assigned at birth. This includes, but is not limited to, lesbian, gay, bisexual,
	transgender, genderqueer, and gender nonbinary.
Limited English-	Any person who does not speak English well or is otherwise unable to
Speaking Proficiency	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, as 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.
MOHCD	Mayor's Office of Housing and Community Development
ОСМ	Office of Contract Management, San Francisco Human Services Agency
OCP	Office of Community Partnerships, Department of Disability and Aging
	Services
Older Adult	Person who is 60 years or older, used interchangeably with "senior."
RAD	Rental Assistance Demonstration
Senior	Person who is 60 years or older, used interchangeably with "older adult."
SF-HSA	Human Services Agency of the City and County of San Francisco.
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
	contractors that provide health care and social services to seek to collect and
	analyze data concerning the sexual orientation and gender identity of the
	clients they serve (Chapter 104, Sections 104.1 through 104.9).

III. Target Population

This program is designed to serve all ethnicities and populations in Grantee's RAD converted housing units, with focused expertise to promote the unique cultural needs which have been identified as demonstrating the greatest economic and social need:

- Persons with low income
- Persons who are socially isolated
- Persons with limited English-speaking proficiency
- Persons from communities of color
- Persons who identify as LGBTQ+
- Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be:

- An older adult, aged 60 years or over or
- An adult with a disability, aged 18-59 and
- Residing in housing units at the locations indicated below

V. Location and Time of Services

Services will be provided at 320 and 330 Clementina Street, San Francisco, CA, 94103, Monday through Friday, during regular office hours of 8:30 a.m. to 5:00 p.m., excluding holidays. On occasion, workshops or events will be provided after hours or on weekends.

VI. Description of Services and Program Requirements

- 1. Grantee will provide four categories of services to older adults and adults with disabilities under this grant:
 - i. Outreach
 - a. Establish and maintain positive relationships with tenants.
 - b. Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.
 - c. Contact all new tenants to invite them to join community activities.
 - d. Contact, interact, inform, and invite all tenants to make use of support services to assist with and address individual needs or issues. These efforts will include a variety of outreach techniques such as written messages in appropriate languages, flyers, brochures, telephone calls, open-house events, and emails (as available).
 - ii. Service Connection
 - a. Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
 - b. Provide service needs assessment, information and referral, crisis intervention, and counseling with individuals and groups of tenants, as needed.
 - c. Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
 - d. Provide short-term case management services to tenants as needed, while working to connect those with longer-term needs to ongoing case management services.
 - e. Serve as a liaison or advocate for tenants with other service providers.
 - f. Assist tenants in identifying and accessing community services needed to meet tenant's specific needs or to make progress toward identified goals.
 - iii. Housing Stability
 - a. Work cooperatively and as part of a team with property management staff to meet the needs of tenants.

- b. Conduct direct outreach to all tenants who become delinquent in rent payments, and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- c. Conduct direct outreach to all tenants who are experiencing safety concerns or lease/house rule violations, or who have been involved in critical incidents.
- d. Provide information on various topics that will help tenants maintain their housing; provide assistance in communicating with, responding to, and meeting with property management to help tenancies resolve issues related to housing; provide assistance in the remedy of incidences and/or lease violations that could lead to eviction by establishing written plans; and/or provide assistance with conflict resolution for tenants who need to solve problems or resolve conflicts with other tenants.
- iv. Community Engagement
 - a. Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.
 - b. Provide tenants with opportunities to participate in organized gatherings for peer support, social connections, celebrations/commemorations, and other community events held onsite.
 - c. Provide trainings and educational workshops on a variety of topics relating to health, wellness, finance, housing, and other topics.
- 2. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS|OCP policy memoranda.
- 3. Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.
- 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS|OCP. Grantee will share the survey results with DAS|OCP by March 15th each grant year, or on a mutually agreed-upon date between DAS|OCP and Grantee.
- 5. Grantee will hire, train, and supervise 2.93 FTE (leveraged and/or grant-funded) to provide services.
- 6. Grantee will ensure adequate and culturally-competent staffing to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all program standards. Grantee will ensure services are available in the languages of the tenant population being served.
- 7. Grantee will ensure that units of service provided are tracked and distinguishable.
- 8. Grantee will attend in-service trainings and meetings coordinated and provided by DAS|OCP, and share the information with their staff and volunteers as needed. Grantee will attend RAD-related, MOHCD, and other meetings as needed.
- 9. Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- 10. Grantee is a mandated reporter for witnessed or suspected elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- 11. Grantee will communicate and collaborate regularly with DAS to help provide logistical and operational support to the program, to provide quality services to tenants, and to strategize program direction and services provision.

VII. Service Objectives

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

- Grantee will have individual and group service encounters with at least 65% of unduplicated tenants per month.
- Grantee will provide tenants with a minimum of two (2) activities or events per week (or 104 annually). Types of activities annually must be at least 10% trainings/workshops, 25% health- and wellness-related, and 65% all other.
- All (100%) of households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will provide services to 100% of unduplicated tenants annually. Services can be individual services, community activities, and/or outreach.

VIII. Outcome Objectives

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

- Tenants will feel connected to and involved with their tenant/resident community. At least 50% of unduplicated residents participating in the annual survey will feel "strongly" or "very strongly" about being connected to and involved with their tenant/resident community.
 - Grantee will use the following standardized question: How strongly do you feel connected to and involved with the tenant/resident community at [site]? The options to answer should be "very strongly," "strongly," "somewhat," and "not at all."
- Tenants will have better access to resources improving their health and wellness. At least 50% of unduplicated tenants participating in the annual survey will "agree" or "highly agree" that they have better access to resources that improve their health and wellness.
 - Grantee will use the following standardized question: Do you have better access to resources that increase your health and wellness? The options to answer should be "highly agree," "agree," "neutral," "disagree," and "highly disagree."
- Tenants will have stable housing. At least 95% of households will have obtained and/or maintained reliable, secure, and stable housing that meets the needs of individuals and households.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers into the grantee's

database, using a DAS|OCP-approved intake form.

- 2. Annual and monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
 - a. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VIII (Outcome Objectives). This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th day of the month following the end of the program year.
 - i. Number and percentage of unduplicated tenants to whom services were provided annually.
 - ii. Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "strongly" or "very strongly" when asked about being connected to and involved with their tenant/resident community.
 - iii. Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "agree" or "highly agree" when asked about having better access to resources that improve their health and wellness.
 - iv. Number and percentage of households that have obtained and/or maintained stable housing.
 - b. Grantee will provide a monthly report of activities, referencing the tasks as described in Section VII (Service Objectives). Grantee will enter the monthly metrics in the CARBON database by the 15th day of the following month.
 - i. Number and percentage of unduplicated tenants with individual and group service encounters.
 - ii. Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - iii. Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- 3. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed-upon date between DAS|OCP and the Grantee.
- 4. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and a Security Awareness Training on an annual basis. The Grantee will maintain evidence of staff completion of these trainings.
- 5. Grantee will issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The Grantee must submit the report in CARBON.

- 6. Grantee will develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
- 7. Grantee will develop and deliver a bi-annual summary report of SOGI data collected as required by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10 (June-December data) and July 10 (January-June data).
- 8. Grantee will maintain an updated site chart, using the DAS|OCP approved form, with details about the program.
- 9. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable, and will take all reasonable efforts to implement HIPAA requirements.
- 10. Grantee will develop a grievance policy consistent with DAS|OCP policy memorandum.

For assistance with reporting requirements or submission of reports, contact:

Rocio Duenas Rocio.Duenas@sfgov.org Principal Contract Manager, Office of Contract Management Human Services Agency

or

Rosemarie Tocchini Rosemarie.Tocchini@sfgov.org Program Analyst, Office of Community Partnerships Department of Disability and Aging Services

X. Monitoring Activities

A. <u>Program Monitoring</u>: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates; backup documentation for the units of service and all reporting; progress of service and outcome objectives; the methods by which participant records are collected and maintained; reporting performance; maintenance of service unit logs; agency and organization standards, including a current organizational chart and evidence of provision of annual training to staff in Elder Abuse Prevention and Reporting and Security Awareness; review of program operation, including a review of a written policies-and-procedures manual of all OCP-funded programs; written project income polices if applicable; grievance procedure (must be posted in the center/office and distributed to those consumers who are homebound); site chart with current hours of operation; a board of director list; whether services are provided appropriately according to sections VII (Service Objectives) and VIII (Outcome Objectives); logs of service units based on hours of scheduled activities; sign-in sheets of consumers participating in each activity; and documentation showing the reported units of service are based on scheduled activities at the site.

B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, the quarterly balance sheet, the 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 the Personnel Manual, the Emergency Operations Plan, compliance with the Americans with Disabilities Act, subcontracts, MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	В	С	D	E	F					
1						pendix B, Page 1					
2											
3	HUM	AN SERVICES AG	ENCY CONTRA	ACT BUDGET SU	IMMARY						
4			BY PROGRAM								
5	Grantee Name:	_		Grant Term:							
				-							
6	Tenderloin Neighborhood Development Co	orp		July 1, 2024 - June 3	30, 2028						
7	(Check One) New <u>X</u> Renewal	Modification									
8	If modification, Effective Date of Mod.	No. of Mod.									
9	Program: 320-330 Clementina - RAD Supp	ortive Services									
10	Budget Reference Page No.(s)					TOTAL					
	Program Term	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					
12											
13	Salaries & Benefits	\$312,798	\$322,182	\$328,625	\$335,198	\$1,298,80					
14	Operating Expense	\$0	\$0	\$0	\$0	\$(
	Capital Expenditure					\$(
	Subtotal	\$312,798	\$322,182	\$328,625	\$335,198	\$1,298,80					
	Indirect Percentage (%) (max. 15%)	15%	15%	15%	15%						
	Indirect Cost (Line 16 X Line 17)	\$46,920	\$48,327	\$49,294	\$50,280	\$194,82					
_	Total DAS Expenditures	\$359,717	\$370,509	\$377,919	\$385,477	\$1,493,62					
20		• · · · • • • • •	<i>•</i> / / • • • •	* / * * * *							
	Salaries & Benefits	\$119,907	\$119,906	\$123,839	\$142,316	\$505,96					
	Operating Expense	\$20,963	\$20,963	\$17,030	\$0	\$58,95					
	Capital Expenditure Subtotal	\$0 \$140,870	\$0 \$140,869	\$0 \$140,869	\$0 \$142,316	\$ \$564,92					
	Indirect Percentage (%)					φ00 4 ,02					
	Indirect Cost (Line 16 X Line 17)	15% \$21,130	<u>15%</u> \$21,130	15% \$21,130	<u>15%</u> \$21,347	\$84,73					
	Total Developer Expenditures	\$162,000	\$162,000	\$162,000	\$163,664	\$649,66					
28		ψ102,000	φ102,000	ψ102,000	φ100,004	φ0+0,00					
	Total DAS and Developer Expenditures	\$521,717	\$532,509	\$539,918	\$549,141	\$2,143,28					
30	DAS Revenues	++=-,+ ···	+ = ,	+,	+++++++++++++++++++++++++++++++++++++++	+=, • • •,= •					
31	Local General Fund	\$359,717	\$370,509	\$377,919	\$385,477	\$1,493,62					
32		, , , , , , , , , , , , , , , , , , ,	+ - : - ;	, , , , , , , , , , , , , , , , , , , 	, ,	+ .,					
33											
34											
35 36											
30 37											
38											
39	TOTAL DAS REVENUES	\$359,717	\$370,509	\$377,919	\$385,477	\$1,493,62					
40	Developer Revenues	<i>\</i>	\$0.0,000	\$0.1,010	÷000,117	÷ 1, 100,02					
41	Developer Match Funds	\$162,000	\$162,000	\$162,000	\$163,664	\$649,66					
42											
43											
44			* / * * * *	A 4 5 5 5 5 5		****					
45		\$162,000	\$162,000	\$162,000	\$163,664	\$649,66					
46	Total Revenues	\$521,717	\$532,509	\$539,918	\$549,141	\$2,143,28					
47	Full Time Equivalent (FTE)										
49	Prepared by:	-	Telephone No.		[Date:					
50	HSA-CO Review Signature:										
	HSA #1										

1	Α	В	С	D	E	F	G	Н	I	JΔ	K ppendix B, Page 2
2										~	ppendix b, r age z
3	Crontee Name, Tandarlain Naighborhood Day	valanment Com									
4 5	Grantee Name: Tenderloin Neighborhood Dev Program Name: 320-330 Clementina - RAD Su										
6											
7				Salaries & E	Benefits	Detail					
8											
9	DAS SALARIES & BENEFITS			4-6/30/25		5-6/30/26		6-6/30/27		-6/30/28	TOTAL
10		Annual Full Time	Budge	ted Salary	Budge	eted Salary	Budget	ted Salary	Budget	ed Salary	TOTAL
11	POSITION TITLE	Salary for FTE	FTE	SALARIES	FTE	SALARIES	FTE	SALARIES	FTE	SALARIES	7/1/24-6/30/28
12	Service Coordinator	\$83,716	0.300	\$25,115	0.300	\$26,110	0.30	\$27,143	0.30	\$28,220	\$106,587
13	Service Coordinator	\$68,308	0.800	\$54,646	0.800	\$56,830	0.80	\$59,097	0.80	\$61,465	\$232,037
14	Service Coordinator	\$70,239	0.800	\$56,191	0.800	\$58,442	0.80	\$60,776	0.80	\$63,211	\$238,620
15	Supervisor	\$92,113	0.800	\$73,691	0.800	\$76,613	0.80	\$79,652	0.80	\$82,809	\$312,765
16	Supervisor	\$96,143	0.229	\$22,059	0.207	\$20,659	0.16	\$16,758	0.12	\$12,590	\$72,066
17											\$0
18											\$0
19											\$0
20											
21	TOTALS	\$410,520	2.929	\$231,702	2.907	\$238,653	2.861	\$243,426	2.816	\$248,295	\$962,076
22		φ410,320	2.323	ΨΖΟΤ,ΤΟΖ	2.307	ψ200,000	2.001	ψ240,420	2.010	Ψ240,233	\$902,070
23		ī									
24	EMPLOYEE FRINGE BENEFITS	l	35.0%	\$81,096	35.0%	\$83,529	35.0%	\$85,199	35.0%	\$86,903	\$336,727
25 26											
27	TOTAL DAS SALARIES & BENEFITS			\$312,798		\$322,182		\$328,625		\$335,198	\$1,298,802
28		L		<i></i> ,		<i>vo</i> , . <i>v_</i> _		<i>t</i> ttttttttttttt		<i></i>	¢.,200,002
29	DEVELOPER MATCH POSITION TITLE										
30	Service Coordinator	\$83,716	0.100	\$8,372	0.100	\$8,703	0.100	\$9,048	0.100	\$9,407	\$35,529
31	Service Coordinator	\$68,308	0.200	\$13,662	0.200	\$14,207	0.200	\$14,774	0.200	\$15,366	\$58,009
32	Service Coordinator	70,239	0.200	\$14,048	0.200	\$14,610	0.200	\$15,194	0.200	\$15,803	\$59,655
33	Supervisor	92,113	0.200	\$18,423	0.200	\$19,153	0.200	\$19,913	0.200	\$20,702	\$78,191
34	Supervisor	96,143	0.181	\$17,360	0.203	\$20,334	0.315	\$32,804	0.408	\$44,142	\$114,640
35	Director	\$115,003	0.147	\$16,956	0.099	\$11,811		\$0			\$28,767
36											\$0
37	TOTALS	\$525,523	1.028	\$88,820	1.002	\$88,819	1.015	\$91,733	1.108	\$105,420	\$374,792
38		_									
39	EMPLOYEE FRINGE BENEFITS		35.0%	\$31,087	35.0%	\$31,087	35.0%	\$32,106	35.0%	\$36,897	\$131,177
40											
	TOTAL DEVELOPER SALARIES & BENEFITS	[\$119,907		\$119,906		\$123,839		\$142,316	\$505,969
	TOTAL SALARIES & BENEFITS		3.957	\$432,704	3.909	\$442,088	3.877	\$452,464	3.925	\$477,514	\$1,804,771
43		L	0.007	Ψ 102,10 1	0.000	ψτη 2,000	0.011	ψ10 2 , 101	0.020	ψτ <i>ι</i> ,014	ψ1,004,771
44	HSA #2										

A B C	D E	F G H	H I J	К	L M
1				K	Appendix B, Page 3
2 3					
4 Grantee Name: Tenderloin Neighborhood					
5 Program Name: 320-330 Clementina - RAI	O Supportive Services				
7	Opera	ating Expense Det	ail		
8					TOTAL
9 10 DAS EXPENDITURE CATEGORY	TERM 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
11 Rental of Property					\$0
12 Utilities(Elec, Water, Gas, Phone, Garbage)					\$0
13 Office Supplies, Postage					\$0
14 Building Maintenance and Repair					\$0
15 Printing and Reproduction					\$0
16 Insurance					\$0
17 Staff Training					\$0
18 Staff Travel (Local & Out of Town)					\$0
19 Rental of Equipment					\$0
20					
21 CONSULTANTS					
22 Consultant A					\$0
23 Consultant B					\$0
24 Consultant C					\$0
25					
26 <u>OTHER</u> 27					
28					\$0
29					\$0
30	· · · · · · · · · · · · · · · · · · ·	- <u> </u>	·		\$0
32 TOTAL DAS OPERATING EXPENSE	\$0	\$0	\$0	\$0	\$0
33					
34 DEVELOPER MATCH OPERATING EXPEN	<u>SE</u>				
35 Rental of Property					\$0
36 Utilities(Elec, Water, Gas, Phone, Garbage)	\$720	\$720	\$720		\$2,160
37 Program/Office Supplies, Postage	\$5,520.00	\$5,520.00	\$5,520.00		\$16,560
38 Building Maintenance and Repair					\$0
39 Printing and Reproduction					\$0
40 Insurance					\$0
41 Pangea/AASC database	\$3,073	\$3,073	\$3,073		\$9,219
42 Staff Training	\$6,000	\$6,000	\$2,067		\$14,067
43 Staff Travel (Local & Out of Town)	\$850	\$850	\$850		\$2,550
44 Rental of Equipment		<u> </u>			\$0
45 Other Outside Services	\$4,800	\$4,800	\$4,800		\$14,400
46					
47 TOTAL DEVELOPER OPERATING EXPENS	SE \$20,963	\$20,963	\$17,030	\$0	\$58,956
48 49 TOTAL OPERATING EXPENSE	\$20,963	\$20,963	\$17,030	\$0	\$58,956
50					
51 HSA #3					

Appendix A – Services to be Provided Tenderloin Neighborhood Development Corporation RAD Housing Support Services at 430 Turk Street July 1, 2024 through June 30, 2028

I. Purpose

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of this grant is to provide support services to older adults and adults with disabilities residing in San Francisco RAD converted housing development units, and to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

Adult with a	A person 18 to 59 years of age living with a disability
Disability	r person to to 57 years of age nying with a disability
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
CARBON	personal items, performing housework, using a telephone. Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
City	City and County of San Francisco, a municipal corporation
Communities of Color	An inclusive and unifying term for persons who do not identify as White, who have been historically and systemically disadvantaged by institutionalized and interpersonal racism.
DAS	Department of Disability and Aging Services
Disability	A condition, or combination of conditions, 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	Tenderloin Neighborhood Development Corporation
Health and Wellness Services	Any service that supports and/or promotes tenants' health and well-being (i.e. Adult Day Health, nutrition programs, free health screenings, DAS services, etc.).
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,

II. Definitions

	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, as 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.
MOHCD	Mayor's Office of Housing and Community Development
OCM	Office of Contract Management, San Francisco Human Services Agency
OCP	Office of Community Partnerships, Department of Disability and Aging Services
Older Adult	Person who is 60 years or older, used interchangeably with "senior."
RAD	Rental Assistance Demonstration
Senior	Person who is 60 years or older, used interchangeably with "older adult."
SF-HSA	Human Services Agency of the City and County of San Francisco.
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 contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9).

III. Target Population

This program is designed to serve all ethnicities and populations in Grantee's RAD converted housing units, with focused expertise to promote the unique cultural needs which have been identified as demonstrating the greatest economic and social need:

- Persons with low income
- Persons who are socially isolated
- Persons with limited English-speaking proficiency
- Persons from communities of color
- Persons who identify as LGBTQ+
- Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be:

- An older adult, aged 60 years or over or
- An adult with a disability, aged 18-59 and
- Residing in housing units at the locations indicated below
- V. Location and Time of Services

Services will be provided at 430 Turk Street, San Francisco, CA, 94102, Monday through Friday, during regular office hours of 8:30 a.m. to 5:00 p.m., excluding holidays. On occasion, workshops or events will be provided after hours or on weekends.

VI. Description of Services and Program Requirements

- 1. Grantee will provide four categories of services to older adults and adults with disabilities under this grant:
 - i. Outreach
 - a. Establish and maintain positive relationships with tenants.
 - b. Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.
 - c. Contact all new tenants to invite them to join community activities.
 - d. Contact, interact, inform, and invite all tenants to make use of support services to assist with and address individual needs or issues. These efforts will include a variety of outreach techniques such as written messages in appropriate languages, flyers, brochures, telephone calls, open-house events, and emails (as available).
 - ii. Service Connection
 - a. Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
 - b. Provide service needs assessment, information and referral, crisis intervention, and counseling with individuals and groups of tenants, as needed.
 - c. Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
 - d. Provide short-term case management services to tenants as needed, while working to connect those with longer-term needs to ongoing case management services.
 - e. Serve as a liaison or advocate for tenants with other service providers.
 - f. Assist tenants in identifying and accessing community services needed to meet tenant's specific needs or to make progress toward identified goals.
 - iii. Housing Stability
 - a. Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
 - b. Conduct direct outreach to all tenants who become delinquent in rent

payments, and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.

- c. Conduct direct outreach to all tenants who are experiencing safety concerns or lease/house rule violations, or who have been involved in critical incidents.
- d. Provide information on various topics that will help tenants maintain their housing; provide assistance in communicating with, responding to, and meeting with property management to help tenancies resolve issues related to housing; provide assistance in the remedy of incidences and/or lease violations that could lead to eviction by establishing written plans; and/or provide assistance with conflict resolution for tenants who need to solve problems or resolve conflicts with other tenants.
- iv. Community Engagement
 - a. Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.
 - b. Provide tenants with opportunities to participate in organized gatherings for peer support, social connections, celebrations/commemorations, and other community events held onsite.
 - c. Provide trainings and educational workshops on a variety of topics relating to health, wellness, finance, housing, and other topics.
- 2. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS|OCP policy memoranda.
- 3. Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.
- 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS|OCP. Grantee will share the survey results with DAS|OCP by March 15th each grant year, or on a mutually agreed-upon date between DAS|OCP and Grantee.
- 5. Grantee will hire, train, and supervise .72 FTE (leveraged and/or grant-funded) to provide services.
- 6. Grantee will ensure adequate and culturally-competent staffing to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all program standards. Grantee will ensure services are available in the languages of the tenant population being served.
- 7. Grantee will ensure that units of service provided are tracked and distinguishable.
- 8. Grantee will attend in-service trainings and meetings coordinated and provided by DAS|OCP, and share the information with their staff and volunteers as needed. Grantee will attend RAD-related, MOHCD, and other meetings as needed.
- 9. Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- 10. Grantee is a mandated reporter for witnessed or suspected elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- 11. Grantee will communicate and collaborate regularly with DAS to help provide logistical and operational support to the program, to provide quality services to tenants, and to strategize program direction and services provision.

VII. Service Objectives

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

- Grantee will have individual and group service encounters with at least 65% of unduplicated tenants per month.
- Grantee will provide tenants with a minimum of two (2) activities or events per week (or 104 annually). Types of activities annually must be at least 10% trainings/workshops, 25% health- and wellness-related, and 65% all other.
- All (100%) of households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will provide services to 100% of unduplicated tenants annually. Services can be individual services, community activities, and/or outreach.

VIII. Outcome Objectives

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

- Tenants will feel connected to and involved with their tenant/resident community. At least 50% of unduplicated residents participating in the annual survey will feel "strongly" or "very strongly" about being connected to and involved with their tenant/resident community.
 - Grantee will use the following standardized question: How strongly do you feel connected to and involved with the tenant/resident community at [site]? The options to answer should be "very strongly," "strongly," "somewhat," and "not at all."
- Tenants will have better access to resources improving their health and wellness. At least 50% of unduplicated tenants participating in the annual survey will "agree" or "highly agree" that they have better access to resources that improve their health and wellness.
 - Grantee will use the following standardized question: Do you have better access to resources that increase your health and wellness? The options to answer should be "highly agree," "agree," "neutral," "disagree," and "highly disagree."
- Tenants will have stable housing. At least 95% of households will have obtained and/or maintained reliable, secure, and stable housing that meets the needs of individuals and households.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers into the grantee's database, using a DAS|OCP-approved intake form.

- 2. Annual and monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
 - a. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VIII (Outcome Objectives). This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th day of the month following the end of the program year.
 - i. Number and percentage of unduplicated tenants to whom services were provided annually.
 - ii. Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "strongly" or "very strongly" when asked about being connected to and involved with their tenant/resident community.
 - iii. Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "agree" or "highly agree" when asked about having better access to resources that improve their health and wellness.
 - iv. Number and percentage of households that have obtained and/or maintained stable housing.
 - b. Grantee will provide a monthly report of activities, referencing the tasks as described in Section VII (Service Objectives). Grantee will enter the monthly metrics in the CARBON database by the 15th day of the following month.
 - i. Number and percentage of unduplicated tenants with individual and group service encounters.
 - ii. Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - iii. Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- 3. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed-upon date between DAS|OCP and the Grantee.
- 4. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and a Security Awareness Training on an annual basis. The Grantee will maintain evidence of staff completion of these trainings.
- 5. Grantee will issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The Grantee must submit the report in CARBON.
- 6. Grantee will develop and deliver ad hoc reports as requested by SF-HSA, DAS, and

6 of 8

OCP.

- 7. Grantee will develop and deliver a bi-annual summary report of SOGI data collected as required by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10 (June-December data) and July 10 (January-June data).
- 8. Grantee will maintain an updated site chart, using the DAS|OCP approved form, with details about the program.
- 9. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable, and will take all reasonable efforts to implement HIPAA requirements.
- 10. Grantee will develop a grievance policy consistent with DAS|OCP policy memorandum.

For assistance with reporting requirements or submission of reports, contact:

Rocio Duenas Rocio.Duenas@sfgov.org Principal Contract Manager, Office of Contract Management Human Services Agency

or

Rosemarie Tocchini Rosemarie.Tocchini@sfgov.org Program Analyst, Office of Community Partnerships Department of Disability and Aging Services

X. Monitoring Activities

A. <u>Program Monitoring</u>: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates; backup documentation for the units of service and all reporting; progress of service and outcome objectives; the methods by which participant records are collected and maintained; reporting performance; maintenance of service unit logs; agency and organization standards, including a current organizational chart and evidence of provision of annual training to staff in Elder Abuse Prevention and Reporting and Security Awareness; review of program operation, including a review of a written policies-and-procedures manual of all OCP-funded programs; written project income polices if applicable; grievance procedure (must be posted in the center/office and distributed to those consumers who are homebound); site chart with current hours of operation; a board of director list; whether services are provided appropriately according to sections VII (Service Objectives) and VIII (Outcome Objectives); logs of service units based on hours of scheduled activities; sign-in sheets of consumers participating in each activity; and documentation showing the reported units of service are based on scheduled activities at the site.

B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, the quarterly balance sheet, the 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 the Personnel Manual, the Emergency Operations Plan, compliance with the Americans with Disabilities Act, subcontracts, MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

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1		5		5		pendix B, Page 1					
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3	HUM	AN SERVICES AG	ENCY CONTRA	ACT BUDGET SU	IMMARY						
4			BY PROGRAM								
-	Oranta a Naman			One web To many							
5	Grantee Name:			Grant Term:							
6	Tenderloin Neighborhood Development Co	orp		July 1, 2024 - June 3	30, 2028						
7	(Check One) New X Renewal	Modification									
Q	If modification, Effective Date of Mod.	No. of Mod.									
0											
9	9 Program: Rental Assistance Demonstration - 430 Turk Street										
						TOTAL					
	Budget Reference Page No.(s)	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					
12	Program Term DAS Expenditures	//1/24-6/30/25	1/1/20-0/30/20	//1/20-0/30/27	//1/27-6/30/28	//1/24-0/30/28					
	-	¢74 596	¢76 000	¢79.250	¢70.007	¢200 605					
	Salaries & Benefits Operating Expense	\$74,586 \$0	<u>\$76,823</u> \$0	\$78,359 \$0	\$79,927 \$0	\$309,695 \$0					
	Capital Expenditure	ψυ	ψυ	φυ	ψυ	\$0 \$0					
	Subtotal	\$74,586	\$76,823	\$78,359	\$79,927	\$309,695					
17	Indirect Percentage (%) (max. 15%)	15%	15%	15%	15%						
	Indirect Cost (Line 16 X Line 17)	\$11,188	\$11,523	\$11,754	\$11,989	\$46,454					
19	Total DAS Expenditures	\$85,773	\$88,346	\$90,113	\$91,916	\$356,148					
20	Developer Match Expenditures										
21	Salaries & Benefits	\$61,485	\$64,675	\$68,794	\$73,104	\$268,058					
22	Operating Expense	\$8,950	\$5,760	\$1,641	\$0	\$16,351					
23	Capital Expenditure	\$0	\$0	\$0	\$0	\$0					
24	Subtotal	\$70,435	\$70,435	\$70,435	\$73,104	\$284,409					
25		15%	15%	15%	15%						
26	Indirect Cost (Line 16 X Line 17)	\$10,565	\$10,565	\$10,565	\$10,966	\$42,661					
27		\$81,000	\$81,000	\$81,000	\$84,070	\$327,070					
28											
29		\$166,774	\$169,346	\$171,113	\$175,986	\$683,219					
30											
31	Local General Fund	\$85,773	\$88,346	\$90,113	\$91,916	\$356,148					
32 33											
34											
35											
36											
37											
38											
39	TOTAL DAS REVENUES	\$85,773	\$88,346	\$90,113	\$91,916	\$356,148					
40	Developer Revenues										
41	Developer Match Funds	\$81,000	\$81,000	\$81,000	\$84,070	\$327,070					
42 43											
43											
44	Total Developer Revenues	\$81,000	\$81,000	\$81,000	\$84,070	\$327,070					
	•										
46		\$166,774	\$169,346	\$171,113	\$175,986	\$683,219					
47	Full Time Equivalent (FTE)										
49	Prepared by:		Telephone No.		ī	Date:					
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50	HSA-CO Review Signature:										
	HSA #1										

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2											
3	Grantee Name: Tenderloin Neighborhood De	volonment Corn									
			eet								
6											
7				Salaries & E	Benefits	Detail					
8]										
9 10	DAS SALARIES & BENEFITS			4-6/30/25 ted Salary	7/1/25-6/30/26 Budgeted Salary		7/1/26-6/30/27 Budgeted Salary			'-6/30/28 ted Salary	TOTAL
10		Annual Full Time	Buuge	leu Salai y	Buuge	eleu Salai y	Buuye	leu Salai y	Buugei	eu Salal y	TOTAL
11		Salary for FTE	FTE	SALARIES	FTE	SALARIES	FTE	SALARIES	FTE	SALARIES	7/1/24-6/30/28
12	Service Coordinator	\$77,293	0.071	\$5,474	0.064	\$5,144	0.050	\$4,213	0.037	\$3,222	\$18,053
13	Service Coordinator	\$75,739	0.606	\$45,929	0.606	\$47,762	0.606	\$49,672	0.606	\$51,657	\$195,020
14	Supervisor	\$96,143	0.040	\$3,846	0.040	\$3,999	0.040	\$4,160	0.040	\$4,326	\$16,331
15											\$0
16											\$0
17											\$0
18											\$0
19											\$0
20											\$0
21											
22	TOTALS	\$249,175	0.717	\$55,249	0.710	\$56,906	0.697	\$58,044	0.684	\$59,205	\$229,404
23		¥2.10,110	0.111	\$00,210	0.1.10	400,000	0.001	<i>QCC,C</i> · · ·	0.001	\$00,200	<i>\</i>
24											
25 26	EMPLOYEE FRINGE BENEFITS		35.0%	\$19,337	35.0%	\$19,917	35.0%	\$20,315	35.0%	\$20,722	\$80,291
27											
28	TOTAL DAS SALARIES & BENEFITS			\$74,586		\$76,823		\$78,359		\$79,927	\$309,695
29											
30	DEVELOPER MATCH POSITION TITLE										
31	Service Coordinator	\$77,293	0.079	\$6,120	0.086	\$6,909	0.100	\$8,320	0.113	\$9,808	\$31,157
32	Service Coordinator	\$75,739	0.394	\$29,810	0.394	\$31,000	0.394	\$32,239	0.394	\$33,528	\$126,578
33	Supervisor	96,143	0.100	\$9,614	0.100	\$9,998	0.100	\$10,399	0.100	\$10,815	\$40,827
34											\$0
35											\$0
36											\$0
37		\$249,175	0.573	\$45,545	0.580	\$47,908	0.593	\$50,958	0.607	\$54,151	\$198,562
38		·								•	•
	EMPLOYEE FRINGE BENEFITS		35.0%	\$15,941	35.0%	\$16,768	35.0%	\$17,835	35.0%	\$18,953	\$69,497
40				,		,		,		,	
	TOTAL DEVELOPER SALARIES & BENEFITS			\$61,485		\$64,675		\$68,794		\$73,104	\$268,058
	TOTAL SALARIES & BENEFITS		1.290	\$136,071	1.290	\$141,498	1.290	\$147,153	1.290	\$153,031	\$577,753
43											
	HSA #2										

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2														
4	Grantee Name: Tenderloin													
5 6	Program Name: Rental Assi	stance De	mon	stratio	n - 430	Turk Str	ree							
7	-					Ор	erati	ng Expens	e Deta	il				
8						•		•						
9 10	DAS EXPENDITURE CATEG	ORY		TERM	7/1/	/24-6/30/2	25	7/1/25-6/30	/26	7/1/26-6/30/27		7/1/27-6/30/28		TOTAL 7/1/24-6/30/28
	Rental of Property	<u></u>				2.0,00,2								\$0
	Utilities(Elec, Water, Gas, Pho	one Garba	iae)											\$0 \$0
	Office Supplies, Postage	, caiza	.90)											\$0
	Building Maintenance and Re	nair												\$0 \$0
	Printing and Reproduction	pan												\$0
	Insurance													\$0 \$0
	Staff Training	,												\$0
	Staff Travel (Local & Out of To	own)												\$0
	Rental of Equipment													\$0
20														
21	CONSULTANTS													
22	Consultant A													\$0
23														\$0
24	Consultant C													\$0
25														
26 27	OTHER													
28														\$0
29 30														\$0 \$0
31														φU
32	TOTAL DAS OPERATING EX	KPENSE					\$0		\$0	9	50	\$0)	\$0
33														
34	DEVELOPER MATCH OPER	ATING EXI	PEN	SE										
	Rental of Property													\$0
	Utilities(Elec, Water, Gas, Pho	one Garba	nue)			\$5,7	784		6,760	\$1,64				\$13,185
	Program/Office Supplies, Pos		95)			\$1,7		ψι	.,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	ψ1,0-	<u> </u>			\$1,780
	Building Maintenance and Re					ψι,/								\$0
	Printing and Reproduction	pan												\$0 \$0
	Insurance													\$0 \$0
						<u>۴</u>	004							
	Pangea/AASC database						994 102							\$994
	Staff Training						<u>192</u>							\$192
	Staff Travel (Local & Out of To	own)				\$2	200							\$200
	Rental of Equipment													\$0
45						***			- 700	* -				* • • • = •
46 47	TOTAL DEVELOPER OPERA	ATING EXP	'ENS	ÞE		\$8,9	950	\$5	6,760	\$1,64	1	\$0		\$16,351
48	TOTAL OPERATING EXPEN	SE				\$8,9	950	\$5	6,760	\$1,64	1	\$C)	\$16,351
49 50	HSA #3													
	•													

Appendix A – Services to be Provided Tenderloin Neighborhood Development Corporation RAD Housing Support Services at 939-951 Eddy Street July 1, 2024 through June 30, 2028

I. Purpose

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of this grant is to provide support services to older adults and adults with disabilities residing in San Francisco RAD converted housing development units, and to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

Adult with a A perso	
	n 18 to 59 years of age living with a disability
Disability	
At Risk of To be co	onsidered at risk of institutionalization, a person must have, at a
Institutionalization minimu	m, one of the following:
1) funct	ional impairment in a minimum of two Activities of Daily Living
(ADL):	eating, dressing, transferring, bathing, toileting, and grooming; or
· · · · · · · · · · · · · · · · · · ·	dical condition to the extent requiring the level of care that would be
	d in a nursing facility; or 3) be unable to manage his/her own affairs
	motional and/or cognitive impairment, evidenced by functional
	nent in a minimum of three Instrumental Activities of Daily Living
): preparing meals, managing money, shopping for groceries or
	l items, performing housework, using a telephone.
	Services Agency's Contracts Administration Reporting and Billing
	(CARBON) system
	County of San Francisco, a municipal corporation
	usive and unifying term for persons who do not identify as White,
	ve been historically and systemically disadvantaged by
	onalized and interpersonal racism.
DAS Departm	nent of Disability and Aging Services
Disability A condi	tion, or combination of conditions, attributable to a mental,
cognitiv	e, or physical impairment, including hearing and visual
impairn	nents, that results in substantial functional limitations in one (1) or
more of	the following areas of major life activity: a) self-care: activities of
	ring (ADL), and instrumental activities of daily living (IADL); b)
	v for independent living and self-direction; c) cognitive functioning
	otional adjustment.
Grantee Tenderl	oin Neighborhood Development Corporation
Health and Wellness Any ser	vice that supports and/or promotes tenants' health and well-being
	ult Day Health, nutrition programs, free health screenings, DAS
services	
LGBTQ+ An acro	nym/term used to refer to persons who self-identify as non-
heterose	exual and/or whose gender identity does not correspond to their sex

II. Definitions

	assigned at birth. This includes, but is not limited to, lesbian, gay, bisexual,
	transgender, genderqueer, and gender nonbinary.
Limited English-	Any person who does not speak English well or is otherwise unable to
Speaking Proficiency	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, as 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.
MOHCD	Mayor's Office of Housing and Community Development
ОСМ	Office of Contract Management, San Francisco Human Services Agency
OCP	Office of Community Partnerships, Department of Disability and Aging
	Services
Older Adult	Person who is 60 years or older, used interchangeably with "senior."
RAD	Rental Assistance Demonstration
Senior	Person who is 60 years or older, used interchangeably with "older adult."
SF-HSA	Human Services Agency of the City and County of San Francisco.
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
	contractors that provide health care and social services to seek to collect and
	analyze data concerning the sexual orientation and gender identity of the
	clients they serve (Chapter 104, Sections 104.1 through 104.9).

III. Target Population

This program is designed to serve all ethnicities and populations in Grantee's RAD converted housing units, with focused expertise to promote the unique cultural needs which have been identified as demonstrating the greatest economic and social need:

- Persons with low income
- Persons who are socially isolated
- Persons with limited English-speaking proficiency
- Persons from communities of color
- Persons who identify as LGBTQ+
- Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be:

- An older adult, aged 60 years or over or
- An adult with a disability, aged 18-59 and
- Residing in housing units at the locations indicated below

V. Location and Time of Services

Services will be provided at 939-951 Eddy Street, San Francisco, CA, 94102, Monday through Friday, during regular office hours of 8:30 a.m. to 5:00 p.m., excluding holidays. On occasion, workshops or events will be provided after hours or on weekends.

VI. Description of Services and Program Requirements

- 1. Grantee will provide four categories of services to older adults and adults with disabilities under this grant:
 - i. Outreach
 - a. Establish and maintain positive relationships with tenants.
 - b. Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.
 - c. Contact all new tenants to invite them to join community activities.
 - d. Contact, interact, inform, and invite all tenants to make use of support services to assist with and address individual needs or issues. These efforts will include a variety of outreach techniques such as written messages in appropriate languages, flyers, brochures, telephone calls, open-house events, and emails (as available).
 - ii. Service Connection
 - a. Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
 - b. Provide service needs assessment, information and referral, crisis intervention, and counseling with individuals and groups of tenants, as needed.
 - c. Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
 - d. Provide short-term case management services to tenants as needed, while working to connect those with longer-term needs to ongoing case management services.
 - e. Serve as a liaison or advocate for tenants with other service providers.
 - f. Assist tenants in identifying and accessing community services needed to meet tenant's specific needs or to make progress toward identified goals.
 - iii. Housing Stability
 - a. Work cooperatively and as part of a team with property management staff to meet the needs of tenants.

- b. Conduct direct outreach to all tenants who become delinquent in rent payments, and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- c. Conduct direct outreach to all tenants who are experiencing safety concerns or lease/house rule violations, or who have been involved in critical incidents.
- d. Provide information on various topics that will help tenants maintain their housing; provide assistance in communicating with, responding to, and meeting with property management to help tenancies resolve issues related to housing; provide assistance in the remedy of incidences and/or lease violations that could lead to eviction by establishing written plans; and/or provide assistance with conflict resolution for tenants who need to solve problems or resolve conflicts with other tenants.
- iv. Community Engagement
 - a. Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.
 - b. Provide tenants with opportunities to participate in organized gatherings for peer support, social connections, celebrations/commemorations, and other community events held onsite.
 - c. Provide trainings and educational workshops on a variety of topics relating to health, wellness, finance, housing, and other topics.
- 2. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS|OCP policy memoranda.
- 3. Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.
- 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS|OCP. Grantee will share the survey results with DAS|OCP by March 15th each grant year, or on a mutually agreed-upon date between DAS|OCP and Grantee.
- 5. Grantee will hire, train, and supervise .4 FTE (leveraged and/or grant-funded) to provide services.
- 6. Grantee will ensure adequate and culturally-competent staffing to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all program standards. Grantee will ensure services are available in the languages of the tenant population being served.
- 7. Grantee will ensure that units of service provided are tracked and distinguishable.
- 8. Grantee will attend in-service trainings and meetings coordinated and provided by DAS|OCP, and share the information with their staff and volunteers as needed. Grantee will attend RAD-related, MOHCD, and other meetings as needed.
- 9. Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- 10. Grantee is a mandated reporter for witnessed or suspected elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- 11. Grantee will communicate and collaborate regularly with DAS to help provide logistical and operational support to the program, to provide quality services to tenants, and to strategize program direction and services provision.

VII. Service Objectives

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

- Grantee will have individual and group service encounters with at least 65% of unduplicated tenants per month.
- Grantee will provide tenants with a minimum of two (2) activities or events per week (or 104 annually). Types of activities annually must be at least 10% trainings/workshops, 25% health- and wellness-related, and 65% all other.
- All (100%) of households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will provide services to 100% of unduplicated tenants annually. Services can be individual services, community activities, and/or outreach.

VIII. Outcome Objectives

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

- Tenants will feel connected to and involved with their tenant/resident community. At least 50% of unduplicated residents participating in the annual survey will feel "strongly" or "very strongly" about being connected to and involved with their tenant/resident community.
 - Grantee will use the following standardized question: How strongly do you feel connected to and involved with the tenant/resident community at [site]? The options to answer should be "very strongly," "strongly," "somewhat," and "not at all."
- Tenants will have better access to resources improving their health and wellness. At least 50% of unduplicated tenants participating in the annual survey will "agree" or "highly agree" that they have better access to resources that improve their health and wellness.
 - Grantee will use the following standardized question: Do you have better access to resources that increase your health and wellness? The options to answer should be "highly agree," "agree," "neutral," "disagree," and "highly disagree."
- Tenants will have stable housing. At least 95% of households will have obtained and/or maintained reliable, secure, and stable housing that meets the needs of individuals and households.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers into the grantee's

database, using a DAS|OCP-approved intake form.

- 2. Annual and monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
 - a. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VIII (Outcome Objectives). This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th day of the month following the end of the program year.
 - i. Number and percentage of unduplicated tenants to whom services were provided annually.
 - ii. Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "strongly" or "very strongly" when asked about being connected to and involved with their tenant/resident community.
 - iii. Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "agree" or "highly agree" when asked about having better access to resources that improve their health and wellness.
 - iv. Number and percentage of households that have obtained and/or maintained stable housing.
 - b. Grantee will provide a monthly report of activities, referencing the tasks as described in Section VII (Service Objectives). Grantee will enter the monthly metrics in the CARBON database by the 15th day of the following month.
 - i. Number and percentage of unduplicated tenants with individual and group service encounters.
 - ii. Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - iii. Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- 3. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed-upon date between DAS|OCP and the Grantee.
- 4. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and a Security Awareness Training on an annual basis. The Grantee will maintain evidence of staff completion of these trainings.
- 5. Grantee will issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The Grantee must submit the report in CARBON.

- 6. Grantee will develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
- 7. Grantee will develop and deliver a bi-annual summary report of SOGI data collected as required by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10 (June-December data) and July 10 (January-June data).
- 8. Grantee will maintain an updated site chart, using the DAS|OCP approved form, with details about the program.
- 9. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable, and will take all reasonable efforts to implement HIPAA requirements.
- 10. Grantee will develop a grievance policy consistent with DAS|OCP policy memorandum.

For assistance with reporting requirements or submission of reports, contact:

Rocio Duenas Rocio.Duenas@sfgov.org Principal Contract Manager, Office of Contract Management Human Services Agency

or

Rosemarie Tocchini Rosemarie.Tocchini@sfgov.org Program Analyst, Office of Community Partnerships Department of Disability and Aging Services

X. Monitoring Activities

A. <u>Program Monitoring</u>: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates; backup documentation for the units of service and all reporting; progress of service and outcome objectives; the methods by which participant records are collected and maintained; reporting performance; maintenance of service unit logs; agency and organization standards, including a current organizational chart and evidence of provision of annual training to staff in Elder Abuse Prevention and Reporting and Security Awareness; review of program operation, including a review of a written policies-and-procedures manual of all OCP-funded programs; written project income polices if applicable; grievance procedure (must be posted in the center/office and distributed to those consumers who are homebound); site chart with current hours of operation; a board of director list; whether services are provided appropriately according to sections VII (Service Objectives) and VIII (Outcome Objectives); logs of service units based on hours of scheduled activities; sign-in sheets of consumers participating in each activity; and documentation showing the reported units of service are based on scheduled activities at the site.

B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, the quarterly balance sheet, the 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 the Personnel Manual, the Emergency Operations Plan, compliance with the Americans with Disabilities Act, subcontracts, MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

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2										
3	HUMA	AN SERVICES AG		ACT BUDGET SU	IMMARY					
4			BY PROGRAM							
5	Grantee Name:	-		Grant Term:						
5	Glantee Name.			Giant Term.						
6	Tenderloin Neighborhood Development Co	orp		July 1, 2024 - June 3	30, 2028					
7	(Check One) NewX Renewal	Modification								
8	8 If modification, Effective Date of Mod. No. of Mod.									
0										
9	Program: Rental Assistance Demonstratio	n - 939-951 Eddy Stre	et							
10	Budget Reference Page No.(s)					TOTAL				
	Program Term	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				
12	DAS Expenditures	111/24-0/00/20	111/20-0/00/20	111/20-0/00/21	1/1/21-0/00/20	111/24-0/00/20				
13	Salaries & Benefits	\$41,870	\$43,126	\$43,989	\$44,869	\$173,853				
	Operating Expense	\$0	\$0	\$0	\$0	\$0				
15	Capital Expenditure		·			\$0				
	Subtotal	\$41,870	\$43,126	\$43,989	\$44,869	\$173,853				
•••	Indirect Percentage (%) (max. 15%)	15%	15%	15%	15%					
	Indirect Cost (Line 16 X Line 17)	\$6,279	\$6,468	\$6,597	\$6,728	\$26,073				
	Total DAS Expenditures	\$48,149	\$49,594	\$50,586	\$51,597	\$199,920				
20	Developer Match Expenditures									
	Salaries & Benefits	\$67,920	\$71,008	\$74,668	\$78,489	\$292,08				
	Operating Expense	\$2,515	\$0	\$0	\$0	\$2,51				
	Capital Expenditure	\$0	\$0	\$0	\$0	\$004.50				
	Subtotal	\$70,434	\$71,008	\$74,668	\$78,489	\$294,599				
	Indirect Percentage (%)	15%	15%	15%	15%	<u> </u>				
	Indirect Cost (Line 16 X Line 17)	\$10,565	\$10,651	\$11,200	\$11,773	\$44,19				
27 28	Total Developer Expenditures	\$81,000	\$81,659	\$85,868	\$90,263	\$338,789				
28 29	Tatal DAC and Davalance Evenenditures	¢100.140	¢404.050	¢400.454	\$141,860	¢500.74(
29 30	Total DAS and Developer Expenditures DAS Revenues	\$129,149	\$131,253	\$136,454	\$141,00U	\$538,710				
	Local General Fund	\$48,149	\$49,594	\$50,586	\$51,597	\$199,920				
32		\$40,149	φ49,094	\$30,380	\$J1,597	\$199,92				
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39	TOTAL DAS REVENUES	\$48,149	\$49,594	\$50,586	\$51,597	\$199,920				
40 41	Developer Revenues Developer Match Funds	\$81,000	¢01 650	¢05 060	¢00.262	¢220.70				
41	Developer Match Funds	\$61,000	\$81,659	\$85,868	\$90,263	\$338,78				
43										
44										
45	Total Developer Revenues	\$81,000	\$81,659	\$85,868	\$90,263	\$338,789				
46	Total Revenues	\$129,149	\$131,253	\$136,454	\$141,860	\$538,71				
	Full Time Equivalent (FTE)		. ,	• • •		. ,				
	Prepared by:		Telephone No.		l	Date:				
50	HSA-CO Review Signature:									

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	Grantee Name: Tenderloin Neighborhood Dev	velopment Corp									
	Program Name: Rental Assistance Demonstra		y Street								
6											
7				Salaries & E	Benefits	Detail					
8											
-	DAS SALARIES & BENEFITS			-6/30/25		5-6/30/26		6-6/30/27		-6/30/28	TOTAL
10		Annual Full Time	Budge	ed Salary	Budge	ted Salary	Budge	ted Salary	Budget	ed Salary	TOTAL
11	POSITION TITLE	Salary for FTE	FTE	SALARIES	FTE	SALARIES	FTE	SALARIES	FTE	SALARIES	7/1/24-6/30/28
13	Service Coordinator	\$77,461	0.400	\$31,015	0.397	\$31,945	0.389	\$32,584	0.382	\$33,236	\$128,780
14											\$0
15											\$0
16											\$0
17											\$0
18											\$0
19											\$0
20											\$0
21											
22	TOTALS	\$77,461	0.400	\$31,015	0.397	\$31,945	0.389	\$32,584	0.382	\$33,236	\$128,780
23	101/120	<i>\\\\\\\\\\\\\</i>	0.100	ψ01,010	0.007	ψ01,040	0.000	φ0 <u>2</u> ,00 ⁴	0.002	<i>400,200</i>	¢120,100
24											
25 26	EMPLOYEE FRINGE BENEFITS		35.0%	\$10,855	35.0%	\$11,181	35.0%	\$11,404	35.0%	\$11,633	\$45,073
27											
28	TOTAL DAS SALARIES & BENEFITS			\$41,870		\$43,126		\$43,989		\$44,869	\$173,853
29											
30	DEVELOPER MATCH POSITION TITLE										
31	Service Coordinator	\$77,293	0.050	\$3,865	0.050	\$4,018	0.050	\$4,177	0.050	\$4,343	\$16,403
32	Service Coordinator	\$77,461	0.600	\$46,446	0.603	\$48,580	0.611	\$51,132	0.618	\$53,797	\$199,956
33											\$0
34											\$0
35											\$0
36											\$0
37	TOTALS	\$154,754	0.650	\$50,311	0.653	\$52,598	0.661	\$55,310	0.668	\$58,140	\$216,359
38		2.0.,.01	2.000	÷ 50,011		÷52,000	2.001	÷00,010	5.000	÷00,110	÷2.0,000
	EMPLOYEE FRINGE BENEFITS		35.0%	\$17,609	35.0%	\$18,409	35.0%	\$19,358	35.0%	\$20,349	\$75,726
40		ļ	55.0 %	ψ17,009	55.0 /0	ψ10,409	55.0 %	ψ19,000	55.0%	ψ20,049	φ10,120
	TOTAL DEVELOPER SALARIES & BENEFITS			\$67,920		\$71,008		\$74,668		\$78,489	\$292,085
	TOTAL DEVELOPER SALARIES & BENEFITS		1.050	\$07,920 \$109,789	1.050	\$114,134	1.050	\$118,657	1.050	\$123,358	\$292,085
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4	Grantee Name: Tender															
5 6	Program Name: Rental	Assistan	ce Den	non	stratio	n - 939	-951 Edd	y Stre	е							
7							Ор	eratir	ng Expens	e Deta	ail					
8							-									
9 10	DAS EXPENDITURE CA	TEGORY	,		TERM	7/1/	/24-6/30/2	25	7/1/25-6/30)/26	7/1/	26-6/30/27		7/1/27-6/30/28		TOTAL 7/1/24-6/30/28
	Rental of Property		-				2.0/00/2					20 0,00,21				\$0
	Utilities(Elec, Water, Gas	s Phone	Garbao	ne)												\$0
	Program/Office Supplies			,-,												\$0
	Building Maintenance an															\$0
	Printing and Reproductio															\$0 \$0
	Insurance	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,														\$0 \$0
	Staff Training															\$0 \$0
	Staff Travel (Local & Out	L OF TOWN)														\$0
	Rental of Equipment															\$0
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	CONSULTANTS															\$ 0
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34	DEVELOPER MATCH C	PERATIN	IG EXP	ENS	<u>SE</u>											
35	Rental of Property															\$0
36	Utilities(Elec, Water, Gas	s, Phone,	Garbag	je)												\$0
37	Program/Office Supplies	, Postage					\$1,200	.00								\$1,200
38	Building Maintenance an	id Repair											_			\$0
	Printing and Reproduction														. –	\$0
	Insurance															\$0
41	Pangea/AASC database						\$8	377		<u> </u>						\$877
	Staff Training															\$0
	Staff Travel (Local & Out	t of Town)					\$4	138								\$438
	Rental of Equipment	,														\$0
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	TOTAL DEVELOPER O	PERATIN	g expe	ENS	E		\$2,5	515		\$0		\$0)	\$C)	\$2,515
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Appendix A – Services to be Provided Tenderloin Neighborhood Development Corporation RAD Housing Support Services at Rosa Parks (1251 Turk Street) July 1, 2024 through June 30, 2028

I. Purpose

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of this grant is to provide support services to older adults and adults with disabilities residing in San Francisco RAD converted housing development units, and to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

Adult with a	A person 18 to 59 years of age living with a disability
Disability	
At Risk of Institutionalization	To be considered at risk of institutionalization, a person must have, at a minimum, one of the following:
	 functional impairment in a minimum of two Activities of Daily Living (ADL): eating, dressing, transferring, bathing, toileting, and grooming; or 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	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
City	City and County of San Francisco, a municipal corporation
Communities of Color	An inclusive and unifying term for persons who do not identify as White, who have been historically and systemically disadvantaged by institutionalized and interpersonal racism.
DAS	Department of Disability and Aging Services
Disability	A condition, or combination of conditions, 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	Tenderloin Neighborhood Development Corporation
Health and Wellness Services	Any service that supports and/or promotes tenants' health and well-being (i.e. Adult Day Health, nutrition programs, free health screenings, DAS services, etc.).
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

II. Definitions

	assigned at birth. This includes, but is not limited to, lesbian, gay, bisexual,						
	transgender, genderqueer, and gender nonbinary.						
Limited English-	Any person who does not speak English well or is otherwise unable to						
Speaking Proficiency	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, as 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.						
MOHCD	Mayor's Office of Housing and Community Development						
ОСМ	Office of Contract Management, San Francisco Human Services Agency						
OCP	Office of Community Partnerships, Department of Disability and Aging						
	Services						
Older Adult	Person who is 60 years or older, used interchangeably with "senior."						
RAD	Rental Assistance Demonstration						
Senior	Person who is 60 years or older, used interchangeably with "older adult."						
SF-HSA	Human Services Agency of the City and County of San Francisco.						
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						
	contractors that provide health care and social services to seek to collect and						
	analyze data concerning the sexual orientation and gender identity of the						
	clients they serve (Chapter 104, Sections 104.1 through 104.9).						

III. Target Population

This program is designed to serve all ethnicities and populations in Grantee's RAD converted housing units, with focused expertise to promote the unique cultural needs which have been identified as demonstrating the greatest economic and social need:

- Persons with low income
- Persons who are socially isolated
- Persons with limited English-speaking proficiency
- Persons from communities of color
- Persons who identify as LGBTQ+
- Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be:

- An older adult, aged 60 years or over or
- An adult with a disability, aged 18-59 and
- Residing in housing units at the locations indicated below

V. Location and Time of Services

Services will be provided at Rosa Parks Senior Housing, 1251 Turk Street, San Francisc, CA, 94115, Monday through Friday, during regular office hours of 8:30 a.m. to 5:00 p.m., excluding holidays. On occasion, workshops or events will be provided after hours or on weekends.

VI. Description of Services and Program Requirements

- 1. Grantee will provide four categories of services to older adults and adults with disabilities under this grant:
 - i. Outreach
 - a. Establish and maintain positive relationships with tenants.
 - b. Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.
 - c. Contact all new tenants to invite them to join community activities.
 - d. Contact, interact, inform, and invite all tenants to make use of support services to assist with and address individual needs or issues. These efforts will include a variety of outreach techniques such as written messages in appropriate languages, flyers, brochures, telephone calls, open-house events, and emails (as available).
 - ii. Service Connection
 - a. Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
 - b. Provide service needs assessment, information and referral, crisis intervention, and counseling with individuals and groups of tenants, as needed.
 - c. Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
 - d. Provide short-term case management services to tenants as needed, while working to connect those with longer-term needs to ongoing case management services.
 - e. Serve as a liaison or advocate for tenants with other service providers.
 - f. Assist tenants in identifying and accessing community services needed to meet tenant's specific needs or to make progress toward identified goals.
 - iii. Housing Stability
 - a. Work cooperatively and as part of a team with property management staff to meet the needs of tenants.

- b. Conduct direct outreach to all tenants who become delinquent in rent payments, and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- c. Conduct direct outreach to all tenants who are experiencing safety concerns or lease/house rule violations, or who have been involved in critical incidents.
- d. Provide information on various topics that will help tenants maintain their housing; provide assistance in communicating with, responding to, and meeting with property management to help tenancies resolve issues related to housing; provide assistance in the remedy of incidences and/or lease violations that could lead to eviction by establishing written plans; and/or provide assistance with conflict resolution for tenants who need to solve problems or resolve conflicts with other tenants.
- iv. Community Engagement
 - a. Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.
 - b. Provide tenants with opportunities to participate in organized gatherings for peer support, social connections, celebrations/commemorations, and other community events held onsite.
 - c. Provide trainings and educational workshops on a variety of topics relating to health, wellness, finance, housing, and other topics.
- 2. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS|OCP policy memoranda.
- 3. Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.
- 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS|OCP. Grantee will share the survey results with DAS|OCP by March 15th each grant year, or on a mutually agreed-upon date between DAS|OCP and Grantee.
- 5. Grantee will hire, train, and supervise 1.4 FTE (leveraged and/or grant-funded) to provide services.
- 6. Grantee will ensure adequate and culturally-competent staffing to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all program standards. Grantee will ensure services are available in the languages of the tenant population being served.
- 7. Grantee will ensure that units of service provided are tracked and distinguishable.
- 8. Grantee will attend in-service trainings and meetings coordinated and provided by DAS|OCP, and share the information with their staff and volunteers as needed. Grantee will attend RAD-related, MOHCD, and other meetings as needed.
- 9. Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- 10. Grantee is a mandated reporter for witnessed or suspected elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- 11. Grantee will communicate and collaborate regularly with DAS to help provide logistical and operational support to the program, to provide quality services to tenants, and to strategize

program direction and services provision.

VII. Service Objectives

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

- Grantee will have individual and group service encounters with at least 65% of unduplicated tenants per month.
- Grantee will provide tenants with a minimum of two (2) activities or events per week (or 104 annually). Types of activities annually must be at least 10% trainings/workshops, 25% health- and wellness-related, and 65% all other.
- All (100%) of households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will provide services to 100% of unduplicated tenants annually. Services can be individual services, community activities, and/or outreach.

VIII. Outcome Objectives

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

- Tenants will feel connected to and involved with their tenant/resident community. At least 50% of unduplicated residents participating in the annual survey will feel "strongly" or "very strongly" about being connected to and involved with their tenant/resident community.
 - Grantee will use the following standardized question: How strongly do you feel connected to and involved with the tenant/resident community at [site]? The options to answer should be "very strongly," "strongly," "somewhat," and "not at all."
- Tenants will have better access to resources improving their health and wellness. At least 50% of unduplicated tenants participating in the annual survey will "agree" or "highly agree" that they have better access to resources that improve their health and wellness.
 - Grantee will use the following standardized question: Do you have better access to resources that increase your health and wellness? The options to answer should be "highly agree," "agree," "neutral," "disagree," and "highly disagree."
- Tenants will have stable housing. At least 95% of households will have obtained and/or maintained reliable, secure, and stable housing that meets the needs of individuals and households.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant

agreement by entering the consumer data obtained from consumers into the grantee's database, using a DAS|OCP-approved intake form.

- 2. Annual and monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
 - a. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VIII (Outcome Objectives). This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th day of the month following the end of the program year.
 - i. Number and percentage of unduplicated tenants to whom services were provided annually.
 - ii. Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "strongly" or "very strongly" when asked about being connected to and involved with their tenant/resident community.
 - iii. Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "agree" or "highly agree" when asked about having better access to resources that improve their health and wellness.
 - iv. Number and percentage of households that have obtained and/or maintained stable housing.
 - b. Grantee will provide a monthly report of activities, referencing the tasks as described in Section VII (Service Objectives). Grantee will enter the monthly metrics in the CARBON database by the 15th day of the following month.
 - i. Number and percentage of unduplicated tenants with individual and group service encounters.
 - ii. Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - iii. Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- 3. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed-upon date between DAS|OCP and the Grantee.
- 4. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and a Security Awareness Training on an annual basis. The Grantee will maintain evidence of staff completion of these trainings.
- 5. Grantee will issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The Grantee must submit the report in CARBON.

- 6. Grantee will develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
- 7. Grantee will develop and deliver a bi-annual summary report of SOGI data collected as required by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10 (June-December data) and July 10 (January-June data).
- 8. Grantee will maintain an updated site chart, using the DAS|OCP approved form, with details about the program.
- 9. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable, and will take all reasonable efforts to implement HIPAA requirements.
- 10. Grantee will develop a grievance policy consistent with DAS|OCP policy memorandum.

For assistance with reporting requirements or submission of reports, contact:

Rocio Duenas Rocio.Duenas@sfgov.org Principal Contract Manager, Office of Contract Management Human Services Agency

or

Rosemarie Tocchini Rosemarie.Tocchini@sfgov.org Program Analyst, Office of Community Partnerships Department of Disability and Aging Services

X. Monitoring Activities

A. <u>Program Monitoring</u>: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates; backup documentation for the units of service and all reporting; progress of service and outcome objectives; the methods by which participant records are collected and maintained; reporting performance; maintenance of service unit logs; agency and organization standards, including a current organizational chart and evidence of provision of annual training to staff in Elder Abuse Prevention and Reporting and Security Awareness; review of program operation, including a review of a written policies-and-procedures manual of all OCP-funded programs; written project income polices if applicable; grievance procedure (must be posted in the center/office and distributed to those consumers who are homebound); site chart with current hours of operation; a board of director list; whether services are provided appropriately according to sections VII (Service Objectives) and VIII (Outcome Objectives); logs of service units based on hours of scheduled activities; sign-in sheets of consumers participating in each activity; and documentation showing the reported units of service are based on scheduled activities at the site.

B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, the quarterly balance sheet, the 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 the Personnel Manual, the Emergency Operations Plan, compliance with the Americans with Disabilities Act, subcontracts, MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

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2											
3	HUMA	AN SERVICES AG	ENCY CONTRA	ACT BUDGET SL	IMMARY						
4			BY PROGRAM								
5	Grantee Name:	_		Grant Term:							
6 Tenc	Fenderloin Neighborhood Development Corp July 1, 2024 - June 30, 2028										
7 (Che	eck One) New <u>X</u> Renewal	Modification									
8 If mo	odification, Effective Date of Mod.	No. of Mod.									
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9 Prog	gram: Rental Assistance Demonstration	n - Rosa Parks									
10 Budo	get Reference Page No.(s)					TOTAL					
	gram Term	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					
12	DAS Expenditures										
13 Sala	ries & Benefits	\$152,018	\$156,578	\$159,710	\$162,905	\$631,21					
	rating Expense	\$0	\$0	\$0	\$0	\$					
15 Capi	ital Expenditure					\$					
16 Subt		\$152,018	\$156,578	\$159,710	\$162,905	\$631,21					
	ect Percentage (%) (max. 15%)	15%	15%	15%	15%						
	ect Cost (Line 16 X Line 17)	\$22,803	\$23,488	\$23,957	\$24,436	\$94,68					
	al DAS Expenditures	\$174,821	\$180,066	\$183,667	\$187,340	\$725,89					
20	Developer Match Expenditures										
	ries & Benefits	\$133,041	\$139,826	\$140,870	\$140,869	\$554,60					
	rating Expense	\$7,829	\$1,044	\$0	\$0	\$8,87					
	ital Expenditure	\$0	\$0	\$0	\$0	\$					
24 Subt		\$140,870	\$140,870	\$140,870	\$140,869	\$563,47					
-	ect Percentage (%)	15%	15%	15%	15%						
	ect Cost (Line 16 X Line 17)	\$21,130	\$21,130	\$21,130	\$21,130	\$84,52					
	I Developer Expenditures	\$162,000	\$162,000	\$162,000	\$162,000	\$648,00					
28		¢220.000	¢0.40.000	\$045.007	¢240.240	¢4 070 00					
29 1 otal 30	I DAS and Developer Expenditures DAS Revenues	\$336,820	\$342,066	\$345,667	\$349,340	\$1,373,89					
		¢474.004	¢190.000	¢400.667	¢407.040	<u> </u>					
31 Loca 32	al General Fund	\$174,821	\$180,066	\$183,667	\$187,340	\$725,89					
33											
34											
35											
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38		.	.			-					
	AL DAS REVENUES	\$174,821	\$180,066	\$183,667	\$187,340	\$725,89					
40	Developer Revenues	# 400.000	# 400.000	# 400.000	*	*C 10 C					
41 Deve 42	eloper Match Funds	\$162,000	\$162,000	\$162,000	\$162,000	\$648,00					
42 43											
44											
	I Developer Revenues	\$162,000	\$162,000	\$162,000	\$162,000	\$648,00					
46 Total	l Revenues	\$336,820	\$342,066		\$349,340	\$1,373,89					
		<i> </i>	<i>\\</i>	<i>Q</i> Q-0,007	<i>40 10,010</i>	÷,,,,,,,,					
47 Full]	Time Equivalent (FTE)										
49 Prep	pared by:	-	Telephone No.		[Date:					
50 HSA	-CO Review Signature:										
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51 HSA	#1										

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2											
4	Grantee Name: Tenderloin Neighborhood De	velopment Corp									
5	Program Name: Rental Assistance Demonstra	ation - Rosa Parks									
6											
7 8				Salaries & E	senefits	Detail					
9	DAS SALARIES & BENEFITS		7/1/2	4-6/30/25	7/1/2	5-6/30/26	7/1/26	6-6/30/27	7/1/27	-6/30/28	
10		Annual Full Time	Budge	ted Salary	Budge	eted Salary	Budge	ted Salary	Budget	ed Salary	TOTAL
11	POSITION TITLE	Salary for FTE	FTE	SALARIES	FTE	SALARIES	FTE	SALARIES	FTE	SALARIES	7/1/24-6/30/28
12	Service Coordinator	\$77,293	0.300	\$23,188	0.300	\$24,107	0.300	\$25,065	0.300	\$26,053	\$98,413
13	Service Coordinator	\$72,569	0.578	\$41,909	0.578	\$43,582	0.578	\$45,327	0.578	\$47,146	\$177,964
14	Service Coordinator	\$83,716	0.200	\$16,743	0.200	\$17,407	0.200	\$18,095	0.200	\$18,813	\$71,058
15	Supervisor	\$96,143	0.320	\$30,766	0.309	\$30,888	0.287	\$29,817	0.265	\$28,658	\$120,129
16											\$0
17											\$0
18											\$0
19											\$0
20											\$0
21											
	TOTALS	\$329,722	1.398	¢112.606	1.386	\$115,984	1.364	¢119.204	1.342	¢100.670	\$467,564
22 23	IOTALS	\$329,722	1.390	\$112,606	1.300	 φ115,964	1.304	\$118,304	1.342	\$120,670	\$407,504
24											
25	EMPLOYEE FRINGE BENEFITS		35.0%	\$39,412	35.0%	\$40,594	35.0%	\$41,406	35.0%	\$42,235	\$163,647
26 27											
28	TOTAL DAS SALARIES & BENEFITS			\$152,018		\$156,578		\$159,710		\$162,905	\$631,211
29											
30	DEVELOPER MATCH POSITION TITLE										
	Service Coordinator	\$77,293	0.500	\$38,646	0.500	\$40,179	0.500	\$43,035	0.500	\$43,422	\$165,282
32	Service Coordinator	\$72,569	0.423	\$30,661	0.423	\$31,884	0.423	\$33,162	0.423	\$34,492	\$130,199
33		83,716	0.200	\$16,743	0.200	\$17,407	0.200	\$18,095	0.200	\$18,813	\$71,058
34	Supervisor	96,143	0.130	\$12,499	0.141	\$14,105	0.097	\$10,056	0.070	\$7,620	\$44,280
35				÷ ·=, ·••		÷,.00		÷.:,:00		÷:,:=0	\$0
36											\$0 \$0
37	TOTALS	\$329,722	1.253	\$98,549	1.264	\$103,575	1.219	\$104,348	1.193	\$104,348	\$410,819
38		\$020,122		400,010		<i></i>		¢.0.,010		¢.0.,010	<i></i> ,010
	EMPLOYEE FRINGE BENEFITS		35.0%	\$34,492	35.0%	\$36,251	35.0%	\$36,522	35.0%	\$36,522	\$143,787
40			00.070	Ψ07,702	55.070	Ψ 00,20 1	00.070	Ψ U U,UZZ	55.070	Ψ 00,0 22	ψ1-0,101
	TOTAL DEVELOPER SALARIES & BENEFITS			\$133,041		\$139,826		\$140,870		\$140,869	\$554,606
	TOTAL SALARIES & BENEFITS		2.650	\$285,059	2.650	\$296,404	2.583	\$300,580	2.535	\$303,774	\$1,185,817
43					,						. ,,
_	HSA #2										

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2													
4	Grantee Name: Tend												
5 6	Program Name: Rent	ai Assistan	ice Demo	nstratior	I - ROSA Parks								
7					0	perating	g Expense D)etail					
8 9													TOTAL
	DAS EXPENDITURE (CATEGORY	<u>/</u>	TERM	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
11	Rental of Property												\$0
12	Utilities(Elec, Water, G	as, Phone,	Garbage)										\$0
13	Office Supplies, Postag	ge											\$0
14	Building Maintenance a	and Repair											\$0
15	Printing and Reproduc	tion											\$0
16	Insurance												\$0
17	Staff Training												\$0
18	Staff Travel (Local & O	out of Town)											\$0
19	Rental of Equipment												\$0
20													
21	<u>CONSULTANTS</u>												
22	Consultant A												\$0
23	Consultant B												\$0
24	Consultant C												\$0
25													
26 27	<u>OTHER</u>												
28				_									\$0
29 30				-									\$0 \$0
31				-									÷**
32	TOTAL DAS OPERAT		NSE			\$0	\$	0	\$(<u> </u>	\$(0	\$0
33												_ =	
34	DEVELOPER MATCH	OPERATIN		<u>ISE</u>									
35	Rental of Property												\$0
36	Utilities(Elec, Water, G	as, Phone,	Garbage)										\$0
37	Program/Office Supplie	es, Postage			\$3	,960							\$3,960
38	Building Maintenance a	and Repair											\$0
39	Printing and Reproduc	tion											\$0
40	Insurance												\$0
41	Pangea/AASC databas	se			\$1	,945	\$1,04	4					\$2,989
42	Staff Training					<u>924</u>							\$924
43	Staff Travel (Local & O	out of Town)			\$1	,000							\$1,000
44	Rental of Equipment												\$0
45													
	TOTAL DEVELOPER	OPERATIN	G EXPEN	SE	\$7	,829	\$1,04	4	\$(<u> </u>	\$0)	\$8,872
47 48	TOTAL OPERATING E	EXPENSE			\$7	,829	\$1,04	4	\$0	C	\$0	C	\$8,872
49	HSA #3				· · · · · · · · · · · · · · · · · · ·		· · · · ·						
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Appendix A – Services to be Provided Tenderloin Neighborhood Development Corporation RAD Housing Support Services at 350 Ellis Street July 1, 2024 through June 30, 2028

I. Purpose

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of this grant is to provide support services to older adults and adults with disabilities residing in San Francisco RAD converted housing development units, and to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

Adult with a	A nomen 18 to 50 years of any living with a dischility
	A person 18 to 59 years of age living with a disability
Disability At Risk of	
Institutionalization	To be considered at risk of institutionalization, a person must have, at a
Institutionalization	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	Human Services Agency's Contracts Administration Reporting and Billing
CARDON	Online (CARBON) system
City	City and County of San Francisco, a municipal corporation
Communities of Color	
Communities of Color	An inclusive and unifying term for persons who do not identify as White,
	who have been historically and systemically disadvantaged by institutionalized and interpersonal racism.
DAS	Department of Disability and Aging Services
Disability	A condition, or combination of conditions, 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	Tenderloin Neighborhood Development Corporation
Health and Wellness Services	Any service that supports and/or promotes tenants' health and well-being (i.e. Adult Day Health, nutrition programs, free health screenings, DAS
501 11008	services, etc.).
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,
	assigned at onthis mendees, but is not mined to, resolall, gay, disexual,

II. Definitions

	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, as 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.
MOHCD	Mayor's Office of Housing and Community Development
OCM	Office of Contract Management, San Francisco Human Services Agency
OCP	Office of Community Partnerships, Department of Disability and Aging Services
Older Adult	Person who is 60 years or older, used interchangeably with "senior."
RAD	Rental Assistance Demonstration
Senior	Person who is 60 years or older, used interchangeably with "older adult."
SF-HSA	Human Services Agency of the City and County of San Francisco.
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 contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9).

III. Target Population

This program is designed to serve all ethnicities and populations in Grantee's RAD converted housing units, with focused expertise to promote the unique cultural needs which have been identified as demonstrating the greatest economic and social need:

- Persons with low income
- Persons who are socially isolated
- Persons with limited English-speaking proficiency
- Persons from communities of color
- Persons who identify as LGBTQ+
- Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be:

- An older adult, aged 60 years or over or
- An adult with a disability, aged 18-59 and
- Residing in housing units at the locations indicated below
- V. Location and Time of Services

Services will be provided at 350 Ellis Street, San Francisco, CA, 94102, Monday through Friday, during regular office hours of 8:30 a.m. to 5:00 p.m., excluding holidays. On occasion, workshops or events will be provided after hours or on weekends.

VI. Description of Services and Program Requirements

- 1. Grantee will provide four categories of services to older adults and adults with disabilities under this grant:
 - i. Outreach
 - a. Establish and maintain positive relationships with tenants.
 - b. Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.
 - c. Contact all new tenants to invite them to join community activities.
 - d. Contact, interact, inform, and invite all tenants to make use of support services to assist with and address individual needs or issues. These efforts will include a variety of outreach techniques such as written messages in appropriate languages, flyers, brochures, telephone calls, open-house events, and emails (as available).
 - ii. Service Connection
 - a. Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
 - b. Provide service needs assessment, information and referral, crisis intervention, and counseling with individuals and groups of tenants, as needed.
 - c. Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
 - d. Provide short-term case management services to tenants as needed, while working to connect those with longer-term needs to ongoing case management services.
 - e. Serve as a liaison or advocate for tenants with other service providers.
 - f. Assist tenants in identifying and accessing community services needed to meet tenant's specific needs or to make progress toward identified goals.
 - iii. Housing Stability
 - a. Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
 - b. Conduct direct outreach to all tenants who become delinquent in rent

payments, and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.

- c. Conduct direct outreach to all tenants who are experiencing safety concerns or lease/house rule violations, or who have been involved in critical incidents.
- d. Provide information on various topics that will help tenants maintain their housing; provide assistance in communicating with, responding to, and meeting with property management to help tenancies resolve issues related to housing; provide assistance in the remedy of incidences and/or lease violations that could lead to eviction by establishing written plans; and/or provide assistance with conflict resolution for tenants who need to solve problems or resolve conflicts with other tenants.
- iv. Community Engagement
 - a. Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.
 - b. Provide tenants with opportunities to participate in organized gatherings for peer support, social connections, celebrations/commemorations, and other community events held onsite.
 - c. Provide trainings and educational workshops on a variety of topics relating to health, wellness, finance, housing, and other topics.
- 2. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS|OCP policy memoranda.
- 3. Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, demographic information, assessments, care plans, progress notes, and services provided.
- 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS|OCP. Grantee will share the survey results with DAS|OCP by March 15th each grant year, or on a mutually agreed-upon date between DAS|OCP and Grantee.
- 5. Grantee will hire, train, and supervise .8 FTE (leveraged and/or grant-funded) to provide services.
- 6. Grantee will ensure adequate and culturally-competent staffing to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all program standards. Grantee will ensure services are available in the languages of the tenant population being served.
- 7. Grantee will ensure that units of service provided are tracked and distinguishable.
- 8. Grantee will attend in-service trainings and meetings coordinated and provided by DAS|OCP, and share the information with their staff and volunteers as needed. Grantee will attend RAD-related, MOHCD, and other meetings as needed.
- 9. Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- 10. Grantee is a mandated reporter for witnessed or suspected elder abuse/neglect. Mandated reporter training is required annually for all program staff.
- 11. Grantee will communicate and collaborate regularly with DAS to help provide logistical and operational support to the program, to provide quality services to tenants, and to strategize program direction and services provision.

VII. Service Objectives

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

- Grantee will have individual and group service encounters with at least 65% of unduplicated tenants per month.
- Grantee will provide tenants with a minimum of two (2) activities or events per week (or 104 annually). Types of activities annually must be at least 10% trainings/workshops, 25% health- and wellness-related, and 65% all other.
- All (100%) of households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.
- Grantee will provide services to 100% of unduplicated tenants annually. Services can be individual services, community activities, and/or outreach.

VIII. Outcome Objectives

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

- Tenants will feel connected to and involved with their tenant/resident community. At least 50% of unduplicated residents participating in the annual survey will feel "strongly" or "very strongly" about being connected to and involved with their tenant/resident community.
 - Grantee will use the following standardized question: How strongly do you feel connected to and involved with the tenant/resident community at [site]? The options to answer should be "very strongly," "strongly," "somewhat," and "not at all."
- Tenants will have better access to resources improving their health and wellness. At least 50% of unduplicated tenants participating in the annual survey will "agree" or "highly agree" that they have better access to resources that improve their health and wellness.
 - Grantee will use the following standardized question: Do you have better access to resources that increase your health and wellness? The options to answer should be "highly agree," "agree," "neutral," "disagree," and "highly disagree."
- Tenants will have stable housing. At least 95% of households will have obtained and/or maintained reliable, secure, and stable housing that meets the needs of individuals and households.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers into the grantee's database, using a DAS|OCP-approved intake form.

- 2. Annual and monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
 - a. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VIII (Outcome Objectives). This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th day of the month following the end of the program year.
 - i. Number and percentage of unduplicated tenants to whom services were provided annually.
 - ii. Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "strongly" or "very strongly" when asked about being connected to and involved with their tenant/resident community.
 - iii. Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with "agree" or "highly agree" when asked about having better access to resources that improve their health and wellness.
 - iv. Number and percentage of households that have obtained and/or maintained stable housing.
 - b. Grantee will provide a monthly report of activities, referencing the tasks as described in Section VII (Service Objectives). Grantee will enter the monthly metrics in the CARBON database by the 15th day of the following month.
 - i. Number and percentage of unduplicated tenants with individual and group service encounters.
 - ii. Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - iii. Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- 3. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed-upon date between DAS|OCP and the Grantee.
- 4. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and a Security Awareness Training on an annual basis. The Grantee will maintain evidence of staff completion of these trainings.
- 5. Grantee will issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The Grantee must submit the report in CARBON.
- 6. Grantee will develop and deliver ad hoc reports as requested by SF-HSA, DAS, and

6 of 8

OCP.

- 7. Grantee will develop and deliver a bi-annual summary report of SOGI data collected as required by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10 (June-December data) and July 10 (January-June data).
- 8. Grantee will maintain an updated site chart, using the DAS|OCP approved form, with details about the program.
- 9. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable, and will take all reasonable efforts to implement HIPAA requirements.
- 10. Grantee will develop a grievance policy consistent with DAS|OCP policy memorandum.

For assistance with reporting requirements or submission of reports, contact:

Rocio Duenas Rocio.Duenas@sfgov.org Principal Contract Manager, Office of Contract Management Human Services Agency

or

Rosemarie Tocchini Rosemarie.Tocchini@sfgov.org Program Analyst, Office of Community Partnerships Department of Disability and Aging Services

X. Monitoring Activities

A. <u>Program Monitoring</u>: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates; backup documentation for the units of service and all reporting; progress of service and outcome objectives; the methods by which participant records are collected and maintained; reporting performance; maintenance of service unit logs; agency and organization standards, including a current organizational chart and evidence of provision of annual training to staff in Elder Abuse Prevention and Reporting and Security Awareness; review of program operation, including a review of a written policies-and-procedures manual of all OCP-funded programs; written project income polices if applicable; grievance procedure (must be posted in the center/office and distributed to those consumers who are homebound); site chart with current hours of operation; a board of director list; whether services are provided appropriately according to sections VII (Service Objectives) and VIII (Outcome Objectives); logs of service units based on hours of scheduled activities; sign-in sheets of consumers participating in each activity; and documentation showing the reported units of service are based on scheduled activities at the site.

B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, the quarterly balance sheet, the 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 the Personnel Manual, the Emergency Operations Plan, compliance with the Americans with Disabilities Act, subcontracts, MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	В	E	F	G	Н						
1				-	-	ppendix B, Page 1						
2						5/20/2024						
3												
4		VICES AGENCY	CONTRACT B	UDGET SUMMA	ARY							
5												
6	Grantee Name:			Grant Term:								
-	Tenderloin Neighborhood Development Corp July 1, 2024 - June 30, 2028											
8	(Check One) X New Renewal Modification											
9	If modification, Effective Date of Mod. No. of M											
-	Program: 350 Ellis - Rental Assistance Demo											
	Budget Reference Page No.(s)					TOTAL						
	Program Term	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						
13												
14												
	Salaries & Benefits	\$69.278	\$69,278	\$69,278	\$69,278	\$277,113						
	Operating Expense	\$6,991	\$9,280	\$10,850	\$12,453	\$39,574						
	Capital Expenditure	<i>40,001</i>	<i>\\\\\\\\\\\\\</i>	÷:0,000	<i><i><i></i></i></i>	<i>\</i> \\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\						
	Subtotal	\$76,269	\$78,558	\$80,128	\$81,731	\$316,687						
-	Indirect Percentage (%)	12%	12%	12%	12%	12%						
20		\$9.152	\$9,427	\$9,615	\$9,808	\$38,002						
21		\$85,422	\$87,985	\$89,744	\$91,539	\$354,690						
22		<i>400,422</i>	<i>401,300</i>	ψ 0 0,7++	φ31,005	φ00 4 ,000						
23	-	\$81,141	\$81,141	\$81,141	\$81,141	\$324,565						
	Operating Expense	\$10,872	\$14,093	\$17,426	\$20,876	\$63,267						
	Capital Expenditure	\$10,072	\$14,095	\$17,420	φ20,070	φ03,207						
	Subtotal	\$92,013	\$95,234	\$98,567	\$102,017	\$387,832						
	Indirect Percentage (%)	12.00%	12.00%	12.00%	12.00%	12.00%						
			\$11,428	\$11,828	\$12,242							
20	Indirect Cost (Line 16 X Line 17) Total Developer Expenditures	\$11,042 \$103,055	\$106,662	\$110,395	\$12,242 \$114,259	\$46,540 \$434,371						
30		\$103,055	\$100,002	\$110,395	φ114,255	\$ 4 54,571						
31		\$188,476	\$194.648	\$200,139	\$205,798	\$789,061						
32		<i>\\\</i>	¥134,040	<i>\</i>	<i>\\</i> 200,730	<i>\\</i> 705,001						
33	-	\$85,422	\$87,985	\$89,744	\$91,539	\$354,690						
33		φ0 <u></u> 0,422	<i>ф01,90</i> 0	φ09,744	φ91,009	\$354,090						
35												
36 37												
38												
39												
40		фо <u>г</u> 400	#07 005	<u> </u>	¢04 500	#054.000						
41		\$85,422	\$87,985	\$89,744	\$91,539	\$354,690						
42		#400 0FF	#400 000	#440 00C	#444.0F0	# 40 4 0 7 4						
	Developer Match Funds	\$103,055	\$106,662	\$110,395	\$114,259	\$434,371						
44												
45												
46		#400 0F5	#400.000	#440 00C	#444.0F0	# 40 4 0 7 4						
	Total Developer Revenues	\$103,055	\$106,662	\$110,395	\$114,259	\$434,371						
48		\$188,476	\$194,648	\$200,139	\$205,798	\$789,061						
	Full Time Equivalent (FTE)	1.70										
	Prepared by: Ma. Cherlita Sumalpong	Telephone No. 415	-674-6119									
	HSA-CO Review Signature:											
F O	HSA #1											

	A	В	С	D	E	Н	I	J	К	L	М
1	Grantee Name: Tenderloin Neighborho	od Development	Corp							Appe	endix B, Page 2
2	Program Name: 350 Ellis (RAD)										5/20/2024
3	Ŭ (
4											
5											
6						Salarie	s & Benefits	s Detail			
7											
8			Budgete	d Salary	Budgetec	I Salary	Budgetee	Salary	Budgete	d Salary	TOTAL
9		TERM	7/1/24-	6/30/25	7/1/25-6	/30/26	7/1/26-6	3/30/27	7/1/27-0	6/30/28	7/1/24-6/30/28
10	POSITION TITLE	Annual Salary	FTE	SALARIES	FTE	Revised	FTE	Original	FTE	Original	
11	Program Director	\$92,599	0.05	\$4,630	0.05	\$4,630	0.05	\$4,630	0.05	\$4,630	\$18,520
12	Case Manager I	\$62,733	0.50	\$31,366	0.50	\$31,366	0.50	\$31,366	0.50	\$31,366	\$125,466
13	Case Manager II - Part-time	\$69,180	0.25	\$17,295	0.25	\$17,295	0.25	\$17,295	0.25	\$17,295	\$69,180
14											
15											
16											
17	TOTALS	\$224,512	0.80	\$53,291	0.80	\$53,291	0.80	\$53,291	0.80	\$53,291	\$213,165
18											
19	EMPLOYEE FRINGE BENEFITS		30%	\$15,987	30%	\$15,987	30%	\$15,987	30%	\$15,987	\$63,948
20											
21	TOTAL DAS SALARIES & BENEFITS			\$69,278		\$69,278		\$69,278		\$69,278	\$277,113
22											
23	DEVELOPER MATCH POSITION TITLE	E L									
24	Program Director	\$92,599	0.15	\$13,890	0.15	\$13,890	0.15	\$13,890	0.15	\$13,890	\$55,559
25	Case Manager I	\$62,733	0.50	\$31,366	0.50	\$31,366	0.50	\$31,366	0.50	\$31,366	\$125,466
26	Case Manager II - Part-time	\$68,640	0.25	\$17,160	0.25	\$17,160	0.25	\$17,160	0.25	\$17,160	\$68,640
27											
28											
29											
30											
31	TOTALS	\$223,972	0.90	\$62,416	0.90	\$62,416	0.90	\$62,416	0.90	\$62,416	\$249,665
32	_	L			n						
33	EMPLOYEE FRINGE BENEFITS	L	30%	\$18,725	30%	\$18,725	30%	\$18,725	30%	\$18,725	\$74,900
34	4	Ļ									
35	TOTAL DEVELOPER SALARIES & BEN	NEFITS		\$81,141		\$81,141		\$81,141		\$81,141	\$324,565
36	4	Ļ									
37	TOTAL SALARIES & BENEFITS	L	1.70	\$150,419	1.70	\$150,419	1.70	\$150,419	1.70	\$150,419	\$601,678
38	4										
39	HSA #2										

	A	В	С	D	E	Н	IJJ	к	L M	NO P	
1			<u> </u>	0			1.191			Appendix B, F	Page 3
2)/2024
	Grantee Name: Tenderloin Neighborhood D	evelopm	ent C	orp							
4	Program Name: 350 Ellis (RAD)			·							
5	5										
6							Opera	ating Expense I	Detail		
7							-				
9										TOTAL	
10	DAS Expenditure Category	TERM	1	7/1/24-6/30/25	5	7/1/25-6/30/26		7/1/26-6/30/27	7/1/27-6/30/28	7/1/24-6/30/	/28
11	Rental of Property										
12	Utilities (Elec, Water, Gas, Phone, Scavenge	er)								_	
13	Office Supplies, Postage			\$2,5	00	\$2,500		\$2,500	\$2,500	\$10	0,000
14	Building Maintenance Supplies and Repair										
15	Printing and Reproduction										
16	Insurance										
17	Staff Training										
18	Staff Travel-(Local & Out of Town)										
19	Rental of Equipment										
20	Recruitment										
21											
22	OTHER										
23	Resident Activities			\$2,4	91	\$2,780		\$4,350	\$4,953	\$14	4,574
24	Consultants/Subcontractors-Nurse			\$2,0	00	\$4,000		\$4,000	\$5,000	\$15	5,000
25									·		
26											
27	TOTAL DAS OPERATING EXPENSE			\$6,9	91	\$9,280		\$10,850	\$12,453	\$39	9,574
28											
	Developer Match Operating Expense										
	Rental of Property		_						<u> </u>		
	Utilities(Elec, Water, Gas, Phone, Scavenge	er)	_	\$1,8		\$1,800		1,800	1,800		7,200
	Office Supplies, Postage			\$1,0	00	\$2,000		\$3,000	\$3,000	\$	9,000
	Temporary Services (Front Desk Staff)										
	Consultants -Nurse/ IT /Operations Consulta	ant		\$2,0	00	\$2,000		4,000	5,000	\$13	3,000
	Insurance										
	Staff Training								1,000	\$^	1,000
	Staff Travel-(Local & Out of Town)										
	Rental of Equipment			\$3,0	00	\$3,000		3,000	3,500	\$12	2,500
	Recruitment								- <u> </u>		
40											
	OTHER Desident Activities			* < •	70	AE 000		* = 000	A0 570		0.507
42 43	Resident Activities			\$3,0	12	\$5,293		\$5,626	\$6,576	\$20	0,567
10									- <u> </u>		
44		05		¢40.0	70	¢44.000		¢47.400	¢00.070	<u>^</u>	0.007
45	TOTAL DEVELOPER OPERATING EXPEN	эE		\$10,8	12	\$14,093		\$17,426	\$20,876	\$63	3,267
46											
47				¢ 4 7 0	~~~	¢00.070		¢00.070	¢00.000	* 4 • •	0.044
48	TOTAL OPERATING EXPENSE			\$17,8	03	\$23,373		\$28,276	\$33,329	\$102	2,841
49	HSA #3										
50	ПЈА #J										

APPENDIX F - SITE CHART

Date: March 15, 2024

Fiscal Year: FY 2024 - 2028

Agency: Tenderloin Neighborhood Development Corporation

Contract Mailing Address: 201 Eddy St., San Francisco, CA 94102

Director: Katie Lamont, Co - CEO

Program: Sequoia Living Community Services

Program Manager: Melissa Parker

Phone Number: 415.358.3921

Phone Number: 510.353.3193

<u>SITES</u> : Name of Site	Clementina Towers	Rosa Parks	Eddy Street Apartments	Sala Burton	
Address and Zip	330 Clementina St, San Francisco, 94103	1251 Turk St, San Francisco CA 94115	939-951 Eddy St, San Francisco CA 94109	430 Turk St, San Franciscoc, CA 94102	
Phone Number	415 - 471 - 1493	415 - 567 - 0283	415 - 567 - 0283	415 - 775 - 7035	
Fax Number	415 - 538 - 0951	415 - 567 - 0403	415 - 775 - 7038	415 - 861 - 8011	
Neighborhood	SOMA	Western Addition	Tenderloin	Tenderloin	
Supervisorial District No.	District No. 6	District No. 5	District No. 5	District No. 5	
Bus Line #	14, 8, 91, FLIXBUS 2062, LOWL, NOWL	14, 38, 5, 800	MUNI: 19, 31, & GGT: 101,	24, 31, 38, 5, NOWL	
Person in Charge	Melissa Parker	Melissa Parker	Melissa Parker	Melissa Parker	
Site Manager/Coordinator	John McDonald - Supervisor, Anthony Chen - RSC, Brittany Maxson - RSC, Victoriya Kushnir - RSC	Leon Schmidt - Supervisor, EdianBlair Schofield - RSC, Victoriya Kushnir - RSC, Jane Lam - RSC	Leon Schmidt - Supervisor, Anna Rendall - RSC, Jane Lam - RSC	Leon Schmidt - Supervisor, Madeline Snyder - RSC, Jane Lam - RSC	
Additional Programs Offered at Site	Resident services - Information and referral, advocacy, case management, food distribution, exercise class, programs and activities,	Resident services - Information and referral, advocacy, case management, food distribution, programs and activities,	and referral, advocacy, case	Resident services - Information and referral, advocacy, case management, food distribution exercise class, programs and activities,	
Business Days	<u>X</u> Mon <u>X</u> Tue <u>X</u> Wed <u>X Thur X Fri</u> Sat <u>Sun</u>	<u>X_</u> Mon <u>X</u> Tue <u>X</u> Wed <u>X Thur X Fri</u> <u>Sat Sun</u>	<u>X</u> Mon <u>X</u> Tue <u>X</u> Wed <u>X Thur X Fri</u> <u>Sat Sun</u>	<u>X</u> Mon <u>X</u> Tue <u>X</u> Wed <u>X Thur X Fri</u> <u>Sat Sun</u>	
Business Hours	8:30 AM - 5PM	8:30 AM - 5PM	8:30 AM - 5PM	8:30 AM - 5PM	
Hours of Scheduled Programming (for DAS - Funded Programs)	M-F 8:00am - 4:30pm	M-F 8:30am - 5:00pm	M-F 9:00am - 5:30pm	M-F 9:00am - 5:30pm	
Total number of Service Days in FY	260	260	260	260	
Number of Service Days Closed	8	8	8	8	
Days Closed (list holidays closed)	New Year's Day, Martin Luther King Day, President's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving, Christmas	New Year's Day, Martin Luther King Day, President's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving, Christmas	King Day, President's Day, Memorial Day, Independence	New Year's Day, Martin Lutho King Day, President's Day, Memorial Day, Independence Day, Labor Day, Thanksgivinş Christmas	
ADA Accessible	X Yes No	X Yes No	X Yes No	X Yes No	

APPENDIX F - SITE CHART

Date: March 15, 2024

Agency:Tenderloin Neighborhood Development Corporation

Contract Mailing Address: 330 Ellis St, San Francisco 94102

Director: Katie Lamont - Co CEO

Program: GLIDE Community Housing, Inc

Program Manager: Dante Thompson

Fiscal Year: FY 2024-2028

Phone Number: 415.358.3921

Phone Number: 415-400-2635

·	1	1	1		1
<u>SITES</u> : Name of Site	Ellis Gardens				
Address and Zip	350 Ellis St, San Francisco CA 94102				
Phone Number	415 - 538 - 1401				
Fax Number	N/A				
Neighborhood	Tenderloin				
Supervisorial District No.	District No. 5				
Bus Line #	30, 8, 5, 800, 90				
Person in Charge	Dante Thompson (Program Director)				
Site Manager/Coordinator	Mary Toney (Case Manager) & Jen Yin Ma (Case Manager)				
Additional Programs Offered at Site	Holiday celebrations, weekly food bank, coffee hour, community forum, community development , chair exercises, bingo, blood pressure checks and health education with nurse, table games, BINGO, Computer Skills				
Business Days	<u>X_</u> Mon <u>X_</u> Tue <u>X</u> .Wed <u>X_Thur _ X_Fri</u> SatSun				
Business Hours	8:30 AM - 5PM				
Hours of Scheduled Programming (for DAS - Funded Programs)	9:00 AM - 5:30PM				
Total number of Service Days in FY	260				
Number of Service Days Closed	13				
Days Closed (list holidays closed)	Independence Day Labor Day Indigenous Peoples Day Veterans Day Thanksgiving Day Day After Thanksgiving Christmas Day New Year's Day Martin Luther King Jr. Day Presidents' Day César Chávez Day Memorial Day Juneteenth				
ADA Accessible	<u>X</u> Yes <u>No</u>	YesNo	YesNo	YesNo	YesNo

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