



**SAN FRANCISCO
HUMAN SERVICES AGENCY**

MEMORANDUM

Department of Benefits
and Family Support

Department of Disability
and Aging Services

Office of Early Care
and Education

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



London Breed
Mayor

Trent Rhorer
Executive Director

TO: DISABILITY AND AGING SERVICES COMMISSION

THROUGH: SHIREEN McSPADDEN, EXECUTIVE DIRECTOR

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

DATE: JANUARY 6, 2021

SUBJECT: **NEW GRANTS: MULTIPLE GRANTEES (NON-PROFIT) TO PROVIDE LONG TERM HOUSING SUBSIDIES FOR OLDER ADULTS AND ADULTS WITH DISABILITIES**

GRANT TERM: 1/01/2021 – 6/30/2024

GRANT AMOUNTS See Table Below

<u>Funding Source</u>	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
FUNDING:	\$10,850,000			\$1,085,000	\$11,935,000
PERCENTAGE:	100%				100%

DS
EL

The Department of Disability and Aging Services (DAS) requests authorization to enter into new grants with multiple providers to provide long term housing subsidies for the period of January 1, 2021 through June 30, 2024, in an amount of \$10,850,000 plus a 10% contingency for a total amount not to exceed \$11,935,000. The purpose of these grants is to provide housing subsidies to older adults and adults with disabilities in order to assist them in stabilizing current housing or gain access to new housing.

Agency	1/1/21-6/30/21	FY 21-22	FY 22-23	FY 23-24	Total	Contingency	Total
Catholic Charities	\$250,000	\$600,000	\$700,000	\$750,000	\$2,300,000	\$230,000	\$2,530,000
Q Foundation	\$1,050,000	\$1,900,000	\$1,700,000	\$1,600,000	\$6,250,000	\$625,000	\$6,875,000
Self-Help for the Elderly	\$250,000	\$600,000	\$700,000	\$750,000	\$2,300,000	\$230,000	\$2,530,000
Total	\$1,550,000	\$3,100,000	\$3,100,000	\$3,100,000	\$10,850,000	\$1,085,000	\$11,935,000

Background

The challenge of maintaining safe, affordable housing disproportionately affects older adults and adults with disabilities. Older adults and adults with disabilities face an ongoing struggle to maintain stable housing in San Francisco due to increasing rents and a limited supply of safe, affordable housing. More than 38% of adults aged 60 years or older live below 200% of the federal poverty level compared to 27% of those under 60. Income and wealth disparities are particularly pronounced among younger adults with disabilities, one third of whom live below 100% of the federal poverty level versus one in ten younger adults without disabilities.

This program seeks to address this disparity by identifying older adults and adults with disabilities who are facing imminent eviction and help stabilize their housing situation through the use of a housing subsidy payment. Clients eligible for this program will be asked to meet strict eligibility and reporting requirements in order to participate.

The program model is designed around an average monthly housing subsidy of \$800 per month for clients participating in the program. Based on program criteria, and for a limited time, subsidy amount may be as high as \$1200 per month. The current range of subsidy being paid for clients ranges from \$200 to \$1,200 per month. Since the inception of the program, 252 individual clients have been provided a monthly subsidy.

Services to be Provided

The Housing Subsidy for Older Adults and Adults with Disabilities Program shall include the following five components: (1) Program Infrastructure - administrative support of the program, (2) Client Identification and Eligibility – policies used to define eligibility and other client centered procedures, (3) Housing Subsidy Payments – criteria for subsidy amounts and payments, (4) Housing Subsidy Recertification – process used to ensure clients continue to meet eligibility requirements, and (5) Case Planning – actions identified to further stabilize clients' housing situation through connection with support, legal, social, medical, and other services.

Selection

Grantees were selected through Request for Proposals (RFP) #882, which was competitively bid in August 24, 2020.

Funding

Funding for these grants is provided through City and County General Funds.

ATTACHMENTS

Appendix A – Services to be Provided – Catholic Charities

Appendix B – Program Budget – Catholic Charities

Appendix A – Services to be Provided – Q Foundation

Appendix B – Program Budget – Q Foundation

Appendix A – Services to be Provided – Self-Help for the Elderly

Appendix B – Program Budget – Self-Help for the Elderly

**APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE
CATHOLIC CHARITIES**

LONG TERM HOUSING SUBSIDY FOR OLDER ADULTS AND ADULTS WITH DISABILITIES

January 1, 2021 through June 30, 2024

I. Purpose of Grant

Older adults and adults with disabilities face an ongoing struggle to maintain stable housing in San Francisco due to increasing rents and a limited supply of safe, affordable housing.

By providing housing subsidies this grant prevents homelessness by identifying older adults and adults with disabilities in unstable housing situations and stabilizes that housing.

II. Definitions

Adult with a Disability	A person 18 to 59 years of age living with a disability.
AMI	Area Median Income for the area containing San Francisco is a figure established by the United States Department of Housing and Urban Development on an annual basis. The City of San Francisco’s Mayor’s Office on Housing (sf-moh.org) publishes an AMI chart each year.
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
Controller	Controller of the City and County of San Francisco or designated agent.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment.

Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
Grantee	Catholic Charities
HIV/AIDS	Human Immunodeficiency Virus/Acquired Immune Deficiency Syndrome
HSA	Human Services Agency of the City and County of San Francisco
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years or older, used interchangeably with senior
OCP	Office of Community Partnerships (previously Office on the Aging/OOA)
Purchaser	Director of Purchasing of the City and County of San Francisco, or designated agent
Senior	Person who is 60 years or older, used interchangeably with older adult
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)

Unduplicated Consumer (UDC) A unique consumer receiving a housing subsidy services and reflected via enrollment in CA GetCare.

III. Target Population

Individuals 60 years of age or older or individuals between 18 and 59 years of age that are living with disabilities. Services must target clients who are members of one or more of the following groups that are identified as demonstrating the greatest economic and social need.

In particular:

- Non or limited –English speaking
- Minority
- Frail
- Lesbian/Gay/Bisexual/Transgender/Queer
- Living with HIV/AIDS

IV. Eligibility for Services

In order to obtain housing subsidy services, an individual must meet the following criteria:

- 1) A resident of San Francisco
- 2) Aged 60 and above, or
- 3) Aged 18 to 59 with a disability
- 4) At an income level of 40% of AMI or below
- 5) Lacking stable housing or at risk for homelessness
- 6) Not currently receiving duplicative housing subsidy services
- 7) Has a need for housing subsidy and is willing to participate in the program

V. Location and Time of Services

The Catholic Charities Long Term Housing Subsidies program will be administered from 1555 39th Avenue, San Francisco, CA 94122. The program will be open Monday through Friday from 9:00 am to 5:00 pm.

VI. Description of Services

Housing subsidy programs shall include the following five components: Program Infrastructure, Client Identification and Eligibility, Housing Subsidy Payments, Housing Subsidy Recertification, and Case Planning.

1. Program Infrastructure:

- Ability to provide administrative assistance, data entry, database maintenance, processing of invoices, and to make payments to landlords.
- Creation of purchase service contracts and payment policies.
- Program policies and procedures including all accounting procedures and reporting functions needed to administer housing subsidy program.
- A dedicated database to capture care planning, case management, client information tracking, purchased services and dollars spent for clients on housing subsidies.

2. Client Identification and Eligibility:

- Policies and procedures clearly defining eligibility criteria, application, decision and award process, recertification process.
- Clear policies and procedures for waitlists and other program functions as needed.

3. Housing Subsidy Payments:

- Rent subsidies shall average \$800 per household, per month. The subsidy should be set at the lowest possible amount needed to stably maintain the household.
- Rent limits should conform to HUD Fair Market Rents for San Francisco HUD FMR Metro Area.
- A limited number of subsidies above \$800 may be issued, with a maximum subsidy amount of \$1200, in exceptional situations where there is a reasonable possibility that the subsidy may be brought down to the \$800 average within 24 months. During periods where the monthly subsidy is above \$800, clients will undergo recertification every 3 months. No more than 15% of subsidies during the contract year will be over the average of \$800.
- The subsidy amount is determined by each household's income to rent ratio. Thus, the monthly lease agreement the household has entered into will be calculated against each household's monthly income. The goal will be to use the rental subsidy to bring the household income to rent ratio to 30%. In cases where an \$800 monthly subsidy is insufficient to maintain housing, recipients can elect to pay up to 50% of income toward the tenant portion of rent. Only after tenant reaches 50% rent to income ratio will the \$800 goal be waived and subsidy amount increased up to \$1200 with a 50% rent to income ratio.
- For those receiving a subsidy above \$800 clear documentation of their eligibility and need for the increased subsidy should be available, as well as a plan to reduce the subsidy.
- Grantee must clearly demonstrate linkages to existing resources for income and other resources.
- Grantee will work to ensure sub-standard housing issues are addressed. When evaluating potential housing, units with serious code violations must be excluded. At a minimum, an apartment inspection checklist will be utilized to ensure that units meet minimum safety guidelines. If clients are living in sub-standard housing, a subsidy could be used to pay rent on a new unit.
- Ensure that the housing subsidies paid are reasonable, prudent and properly procured.

4. Housing Subsidy Recertification:

- The subsidy must be recertified annually at minimum, and more frequently if there are concerns about the household's non-compliance, lack of progress, or if sub-standard housing or safety issues are present.
- Subsidies will be need-based as opposed to time-limited. The subsidy may be renewed as long as clients are engaged in their identified plan and continue to meet program eligibility requirements.

5. Case Planning:

- Entrance into and maintenance of a case plan or contract will be mandatory and clients must show good faith, verifiable efforts in making progress toward short and long-term goals. These goals include but are not limited to:
 - Actions to increase income and access to other available resources which help lower overall household expenses.
 - Actions to improve credit history and rental stability.
 - Efforts to address behavioral health issues that negatively impact housing stability.
 - Efforts to access more affordable housing, including applying to appropriate wait lists.
- Grantee will be familiar with other community organizations and assist clients in connecting with other organizations as needed.
- Work collaboratively with other community organizations presently working with the client and additional ones who can provide specific expertise.
- Grantee may also enhance the subsidy model described with additional components that will be effective in achieving successful outcomes.

VII. Service Objectives

For the period January 1, 2021 to June 30, 2021, the Grantee will meet the following service objectives:

- Provide rental subsidy for at least **40** unduplicated consumers.
- Provide **200** months of housing subsidies. A unit of service is one monthly subsidy payment.
- Transition at least **3** unduplicated consumers off of rental subsidy.

For the period July 1, 2021 to June 30, 2022, the Grantee will meet the following service objectives:

- Provide rental subsidy for at least **55** unduplicated consumers.
- Provide **500** months of housing subsidies. A unit of service is one monthly subsidy payment.
- Transition at least **3** unduplicated consumers off of rental subsidy.

For the period July 1, 2022 to June 30, 2023, the Grantee will meet the following service objectives:

- Provide rental subsidy for at least **55** unduplicated consumers.

- Provide **600** months of housing subsidies. A unit of service is one monthly subsidy payment.
- Transition at least **3** unduplicated consumers off of rental subsidy.

For the period July 1, 2023 to June 30, 2024, the Grantee will meet the following service objectives:

- Provide rental subsidy for at least **60** unduplicated consumers.
- Provide **700** months of housing subsidies. A unit of service is one monthly subsidy payment.
- Transition at least **3** unduplicated consumers off of rental subsidy.

VIII. Outcome Objectives

On an annual basis and as needed, Grantee will report progress towards meeting the following outcome objectives:

A. Housing Retention Outcomes

- At least **85%** of clients will remain stably housed 6 months after assistance begins.
- At least **75%** of clients will remain stably housed 12 months after assistance begins.
- At least **50%** of clients leaving subsidy program will remain stably housed 6 months after assistance ends.

B. Client Satisfaction Outcomes

- At least **65%** of program participants will complete and return satisfaction surveys.
- At least **75%** of participants indicate excellent or good in rating the quality of services they receive,
- At least **75%** of consumers who receive housing subsidy report that the subsidy was able to help keep them housed stably,

IX. Reporting Requirements

- A. The Grantee will enter consumers' data into the CA GetCare database system.
- B. The Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- C. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- D. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- E. Grantee will submit response rates and aggregated data from annual consumer survey to Office of Community Partnerships staff by March 15th of each grant year.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system.

- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- H. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as required by state and local law. The due date for submitting the annual summary report is July 10th.
- I. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- J. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- K. Apart from reports to be sent via email to the Program Analyst and/or Contract Manager, all other reports and communications should be sent to the following addresses:

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

Rick Appleby
DAS, Office on the Aging
P.O. Box 7988
San Francisco, CA 94120
Rick.Appleby@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA Getcare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting, evidence that program staff have completed the California Department of Aging (CDA) Security Awareness Training; program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance, and HIPAA compliance.

	A	B	C	D	E	F
1	Appendix B, Page 1					
2						
3	HUMAN SERVICES AGENCY BUDGET SUMMARY					
4	BY PROGRAM					
5	Name		Term			
6	Catholic Charities		1/1/20-6/30/24			
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
8	If modification, Effective Date of Mod.		No. of Mod.			
9	Program: Long Term Housing Subsidies					
10	Budget Reference Page No.(s)					Total
11	Program Term	1/1/21-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	1/1/21-6/30/24
12	Expenditures					
13	Salaries & Benefits	\$68,778	\$139,618	\$139,618	\$139,618	\$487,632
14	Operating Expenses	\$8,093	\$12,516	\$12,516	\$12,516	\$45,641
15	Subtotal	\$76,871	\$152,134	\$152,134	\$152,134	\$533,273
16	Indirect Percentage (%)	15%	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$11,529	\$22,821	\$22,821	\$22,821	\$79,992
18	SubContractor/Capital Expenditures	\$0	\$0	\$0	\$0.00	\$0
19	Housing Subsidies	\$161,600	\$425,045	\$525,045	\$575,045	\$1,686,735
20	Total Expenditures	\$250,000	\$600,000	\$700,000	\$750,000	\$2,300,000
21	HSA Revenues					
22	General Fund	\$250,000	\$600,000	\$700,000	\$750,000	\$2,300,000
23						
24						
25						
26						
27						
28						
29						
30	TOTAL HSA REVENUES	\$250,000	\$600,000	\$700,000	\$750,000	\$2,300,000
31	Other Revenues					
32						
33						
34						
35						
36						
37	Total Revenues	\$250,000	\$600,000	\$700,000	\$750,000	\$2,300,000
38	Full Time Equivalent (FTE)	0.83	1.65	1.65	1.65	
40	Prepared by: Patty Clement/Delilah Perez		Telephone No.: 415-452-3504 / 415-972-1208			
41	HSA-CO Review Signature: _____					
42	HSA #1					6/20/2018

	A	B	C	D	E	F	G	H	I	J
1	Appendix B, Page 2									
2										
3	Catholic Charities									
4	Program: Long Term Housing Subsidies									
5										
6										
7	Salaries & Benefits Detail									
8										
9										
10										
11										
12		Agency Totals		HSA Program		DAAS	DAAS	DAAS	DAAS	TOTAL
		Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
13	Director of Client Services	\$98,000	1.00	15%	0.15	\$7,350	\$14,921	\$14,921	\$14,921	\$52,113
14	Program Director	\$70,286	1.00	50%	0.50	\$17,572	\$35,670	\$35,670	\$35,670	\$124,582
15	Housing Case Manager	\$54,385	1.00	100%	1.00	\$26,791	\$54,385	\$54,385	\$54,385	\$189,946
16										
17										
18										
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21										
22										
23										
24										
25										
26										
27	TOTALS	\$222,671	3.00	165%	1.65	\$51,713	\$104,976	\$104,976	\$104,976	\$366,641
28										
29	FRINGE BENEFIT RATE	33%								
30	EMPLOYEE FRINGE BENEFITS	\$73,481				\$17,065	\$34,642	\$34,642	\$34,642	\$120,991
31										
32										
33	TOTAL SALARIES & BENE	\$296,152				\$68,778	\$139,618	\$139,618	\$139,618	\$487,632
34	HSA #2									6/20/2018

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Appendix B, Page 3												
2													
3	Catholic Charities												
4	Program: Long Term Housing Subsidies												
5													
6													
7	Operating Expense Detail												
8													
9													
10													
11													
12	<u>Expenditure Category</u>			<u>TERM</u>	<u>1/1/21-6/30/21</u>		<u>7/1/21-6/30/22</u>		<u>7/1/23-6/30/24</u>	<u>1/1/21-6/30/24</u>			<u>TOTAL</u> <u>1/1/21-6/30/24</u>
13	Rental of Property				\$2,471		\$4,942		\$4,942	\$4,942			\$17,297
14	Utilities(Elec, Water, Gas, Phone, Garbage)				\$1,200		\$1,854		\$1,854	\$1,854			\$6,762
15	Office Supplies, Postage				\$400		\$412		\$412	\$412			\$1,636
16	Building Maintenance Supplies and Repair				\$117		\$240		\$240	\$240			\$837
17	Printing and Reproduction				\$117		\$240		\$240	\$240			\$837
18	Insurance				\$1,031		\$2,240		\$2,240	\$2,240			\$7,751
19	Staff Training				\$100		\$206		\$206	\$206			\$718
20	Staff Travel-(Local & Out of Town)				\$667		\$1,373		\$1,373	\$1,373			\$4,786
21	Rental of Equipment				\$150		\$309		\$309	\$309			\$1,077
22													
23	CONSULTANTS												
24													
25													
26													
27	OTHER												
28	Computer Related				\$340		\$700		\$700	\$700			\$2,440
29	Start up Computer workstations				\$1,500								\$1,500
30	Housing Subsidies (No Indirect)				\$161,600		\$425,045		\$525,045	\$575,045			\$1,686,735
31													
32	TOTAL OPERATING EXPENSE				\$ 8,093		\$ 12,516		\$ 12,516	\$ 12,516			\$45,641
33													
34	HSA #3												6/20/2018

APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE

Q FOUNDATION

LONG TERM HOUSING SUBSIDY FOR OLDER ADULTS AND ADULTS WITH DISABILITIES

January 1, 2021 through June 30, 2024

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- Living with HIV/AIDS

IV. Eligibility for Services

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- 1) A resident of San Francisco
- 2) Aged 60 and above, or
- 3) Aged 18 to 59 with a disability
- 4) At an income level of 40% of AMI or below
- 5) Lacking stable housing or at risk for homelessness
- 6) Not currently receiving duplicative housing subsidy services
- 7) Has a need for housing subsidy and is willing to participate in the program

V. Location and Time of Services

Services are delivered at Q Foundation offices, 350 Golden Gate Ave., Suite A, San Francisco, CA 94102. Business hours are Monday - Friday, 10am - 6pm. The office facilities are fully accessible to seniors and adults with physical disabilities.

VI. Description of Services

Housing subsidy programs shall include the following five components: Program Infrastructure, Client Identification and Eligibility, Housing Subsidy Payments, Housing Subsidy Recertification, and Case Planning.

1. Program Infrastructure:

- Ability to provide administrative assistance, data entry, database maintenance, processing of invoices, and to make payments to landlords.
- Creation of purchase service contracts and payment policies.
- Program policies and procedures including all accounting procedures and reporting functions needed to administer housing subsidy program.
- A dedicated database to capture care planning, case management, client information tracking, purchased services and dollars spent for clients on housing subsidies.

2. Client Identification and Eligibility:

- Policies and procedures clearly defining eligibility criteria, application, decision and award process, recertification process.
- Clear Policies and procedures for waitlists and other program functions as needed.

3. Housing Subsidy Payments:

- Rent subsidies shall average \$800 per household, per month. The subsidy should be set at the lowest possible amount needed to stably maintain the household.
- Rent limits should conform to HUD Fair Market Rents for San Francisco HUD FMR Metro Area.
- A limited number of subsidies above \$800 may be issued, with a maximum subsidy amount of \$1200, in exceptional situations where there is a reasonable possibility that the subsidy may be brought down to the \$800 average within 24 months. During periods where the monthly subsidy is above \$800, clients will undergo recertification every 3 months. No more than 15% of subsidies during the contract year will be over the average of \$800.
- The subsidy amount is determined by each household's income to rent ratio. Thus, the monthly lease agreement the household has entered into will be calculated against each household's monthly income. The goal will be to use the rental subsidy to bring the household income to rent ratio to 30%. In cases where an \$800 monthly subsidy is insufficient to maintain housing, recipients can elect to pay up to 50% of income toward the tenant portion of rent. Only after tenant reaches 50% rent to income ratio will the \$800 goal be waived and subsidy amount increased up to \$1200 with a 50% rent to income ratio.
- For those receiving a subsidy above \$800 clear documentation of their eligibility and needs for the increased subsidy should be available, as well as a plan to reduce the subsidy.
- Grantee must clearly demonstrate linkages to existing resources for income and other resources.
- Grantee will work to ensure sub-standard housing issues are addressed. When evaluating potential housing, units with serious code violations must be excluded. At a minimum, an apartment inspection checklist will be utilized to ensure that units meet minimum safety guidelines. If clients are living in sub-standard housing, a subsidy could be used to pay rent on a new unit.
- Ensure that the housing subsidies paid are reasonable, prudent and properly procured.

4. Housing Subsidy Recertification:

- The subsidy must be recertified annually at minimum, and more frequently if there are concerns about the household's non-compliance, lack of progress, or if sub-standard housing or safety issues are present.
- Subsidies will be need-based as opposed to time-limited. The subsidy may be renewed as long as clients are engaged in their identified plan and continue to meet program eligibility requirements.

5. Case Planning:

- Entrance into and maintenance of a case plan or contract will be mandatory and clients must show good faith, verifiable efforts in making progress toward short and long-term goals. These goals include but are not limited to:
 - Actions to increase income and access to other available resources which help lower overall household expenses.
 - Actions to improve credit history and rental stability.
 - Efforts to address behavioral health issues that negatively impact housing stability.
 - Efforts to access more affordable housing, including applying to appropriate wait lists.
- Grantee will be familiar with other community organizations and assist clients in connecting with other organizations as needed.
- Work collaboratively with other community organizations presently working with the client and additional ones who can provide specific expertise.
- Grantee may also enhance the subsidy model described with additional components that will be effective in achieving successful outcomes.

VII. Service Objectives

For the period January 1, 2021, to June 30, 2021, the Grantee will meet the following Service Objectives:

- Provide rental subsidy for at least **194** unduplicated consumers.
- Provide **1100** months of housing subsidies. A unit of service is one monthly subsidy payment.
- Transition at least **3** unduplicated consumers off of rental subsidy.

For the period July 1, 2021, to June 30, 2022, the Grantee will meet the following Service Objectives:

- Provide rental subsidy for at least **171** unduplicated consumers.
- Provide **2000** months of housing subsidies. A unit of service is one monthly subsidy payment.
- Transition at least **7** unduplicated consumers off of rental subsidy.

For the period July 1, 2022, to June 30, 2023, the Grantee will meet the following Service Objectives:

- Provide rental subsidy for at least **148** unduplicated consumers.

- Provide **1700** months of housing subsidies. A unit of service is one monthly subsidy payment.
- Transition at least 6 unduplicated consumers off of rental subsidy.

For the period July 1, 2023, to June 30, 2024, the Grantee will meet the following Service Objectives:

- Provide rental subsidy for at least **137** unduplicated consumers.
- Provide **1600** months of housing subsidies. A unit of service is one monthly subsidy payment.
- Transition at least **5** unduplicated consumers off of rental subsidy.

VIII. Outcome Objectives

On an annual basis and as needed, Grantee will report progress towards meeting the following outcome objectives:

A. Housing Retention Outcomes

- At least **85%** of clients will remain stably housed 6 months after assistance begins.
- At least **75%** of clients will remain stably housed 12 months after assistance begins.
- At least **50%** of clients leaving subsidy program will remain stably housed 6 months after assistance ends.

B. Client Satisfaction Outcomes

- At least **65%** of program participants will complete and return satisfaction surveys.
- At least **75%** of participants indicate excellent or good in rating the quality of services they receive,
- At least **75%** of consumers who receive housing subsidy report that the subsidy was able to help keep them housed stably,

IX. Reporting Requirements

- A. The Grantee will enter consumers' data into the CA GetCare database system.
- B. The Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- C. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- D. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- E. Grantee will submit response rates and aggregated data from annual consumer survey to Office of Community Partnerships staff by March 15th of each grant year.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system.

- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- H. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as required by state and local law. The due date for submitting the annual summary report is July 10th.
- I. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- J. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- K. Apart from reports to be sent via email to the Program Analyst and/or Contract Manager, all other reports and communications should be sent to the following addresses:

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

Rick Appleby
DAS, Office on the Aging
P.O. Box 7988
San Francisco, CA 94120
Rick.Appleby@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA Getcare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting, evidence that program staff have completed the California Department of Aging (CDA) Security Awareness Training; program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance, and HIPAA compliance.

	A	B	C	D	E	F
1	Appendix B, Page 1					
2						
3	HUMAN SERVICES AGENCY BUDGET SUMMARY					
4	BY PROGRAM					
5	Name			Term		
6	Agency Name: Q Foundation			1/1/20-6/30/24		
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
8	If modification, Effective Date of Mod.		No. of Mod.			
9	Program: Long-Term Housing Subsidies					
10	Budget Reference Page No.(s)					Total
11	Program Term	1/1/21-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	1/1/21-6/30/24
12	Expenditures					
13	Salaries & Benefits	\$116,886	\$233,771	\$233,771	\$233,771	\$818,199
14	Operating Expenses	\$28,941	\$61,287	\$61,287	\$61,287	\$212,802
15	Subtotal	\$145,827	\$295,058	\$295,058	\$295,058	\$1,031,001
16	Indirect Percentage (%)	15%	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$21,874	\$44,258	\$44,258	\$44,258	\$154,648
18	Housing Subsidies	\$882,299	\$1,560,684	\$1,360,684	\$1,260,684	\$5,064,351
19	Subcontractor/Capital Expenditures	\$0	\$0	\$0	\$0	\$0
20	Total Expenditures	\$1,050,000	\$1,900,000	\$1,700,000	\$1,600,000	\$6,250,000
21	HSA Revenues					
22	General Fund	\$1,050,000	\$1,900,000	\$1,700,000	\$1,600,000	\$6,250,000
23						
24						
25						
26						
27						
28						
29						
30	TOTAL HSA REVENUES	\$1,050,000	\$1,900,000	\$1,700,000	\$1,600,000	\$6,250,000
31	Other Revenues					
32						
33						
34						
35						
36						
37	Total Revenues	\$1,050,000	\$1,900,000	\$1,700,000	\$1,600,000	\$6,250,000
38	Full Time Equivalent (FTE)					
40	Prepared by: Thomas Larsen	Telephone No.: 415 552 8216				
41	HSA-CO Review Signature:	_____				
42	HSA #1	9/23/2020				

	A	B	C	D	E	F	G	H	I	J
1	Appendix B, Page 2									
2										
3	Agency Name: Q Foundation									
4	Program: Long-Term Housing Subsidies									
5										
6										
7	Salaries & Benefits Detail									
8										
9										
10										
11	1/1/21-6/30/21 7/1/21-6/30/22 7/1/22-6/30/23 7/1/23-6/30/24 1/1/21-6/30/24									
12		Agency Totals		HSA Program		DAAS	DAAS	DAAS	DAAS	TOTAL
		Annual Full Time Salary for FTE	Total Program FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
	POSITION TITLE									
13	Program Manager - BB	\$200,000	1.00	22%	0.22	\$22,397	\$44,794	\$44,794	\$44,794	\$156,779
14	Manager of People, Advancement, and Compliance - DK	\$75,000	0.40	22%	0.09	\$3,360	\$6,719	\$6,719	\$6,719	\$23,517
15	Subsidy Payment Manager - TL	\$75,000	1.00	22%	0.22	\$8,399	\$16,798	\$16,798	\$16,798	\$58,792
16	Subsidy Specialist II - Bilingual - JG	\$30,000	0.50	22%	0.11	\$1,680	\$3,360	\$3,360	\$3,360	\$11,758
17	Subsidy Specialist II - Bilingual - OS	\$60,000	1.00	22%	0.22	\$6,719	\$13,438	\$13,438	\$13,438	\$47,034
18	DAAS Subsidy Specialist II - TBD	\$60,000	1.00	100%	1.00	\$30,000	\$60,000	\$60,000	\$60,000	\$210,000
19	Subsidy Specialist I - Bilingual - MT	\$55,000	1.00	22%	0.22	\$6,159	\$12,318	\$12,318	\$12,318	\$43,114
20	Subsidy Specialist I - TB	\$55,000	1.00	22%	0.22	\$6,159	\$12,318	\$12,318	\$12,318	\$43,114
21	Affordable Housing Specialist I - Bilingual - OK	\$45,000	1.00	22%	0.22	\$5,039	\$10,079	\$10,079	\$10,079	\$35,275
22	TOTALS	\$655,000	7.90		2.55	\$89,912	\$179,824	\$179,824	\$179,824	\$629,384
23										
24	FRINGE BENEFIT RATE	30%								
25	EMPLOYEE FRINGE BENEFITS	\$196,500				\$26,974	\$53,947	\$53,947	\$53,947	\$188,815
26										
27										
28	TOTAL SALARIES & BENEFITS	\$851,500				\$116,886	\$233,771	\$233,771	\$233,771	\$818,199
29	HSA #2									9/23/2020

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Appendix B, Page 3												
2													
3	Agency Name: Q Foundation												
4	Program: Long-Term Housing Subsidies												
5													
6													
7	Operating Expense Detail												
8													
9													
10													
11													
12	<u>Expenditure Category</u>			<u>TERM</u>	<u>1/1/21-6/30/21</u>	<u>7/1/21-6/30/22</u>	<u>7/1/22-6/30/23</u>	<u>7/1/23-6/30/24</u>					<u>TOTAL</u> <u>1/1/21-6/30/24</u>
13	Rental of Property				\$2,542	\$5,387	\$5,387	\$5,387					\$18,703
14	Utilities(Elec, Water, Gas, Phone, Garbage)				\$2,875	\$6,094	\$6,094	\$6,094					\$21,157
15	Office Supplies, Software subscriptions				\$908	\$1,924	\$1,924	\$1,924					\$6,680
16	Insurance				\$1,019	\$2,159	\$2,159	\$2,159					\$7,496
17	Payroll processing & delivery				\$484	\$1,026	\$1,026	\$1,026					\$3,562
18	Staff Travel-(Local & Out of Town)				\$0	\$0	\$0	\$0					\$0
19	Outreach				\$254	\$539	\$539	\$539					\$1,871
20	Recruitment				\$3,179	\$6,738	\$6,738	\$6,738					\$23,393
21	Employee/Volunteer Appreciation				\$191	\$405	\$405	\$405					\$1,406
22	Rent Subsidy Payment Processing Fees				\$2,009	\$4,209	\$4,209	\$4,209					\$14,636
23													
24	CONSULTANTS												
25	Security and Privacy Audit				\$2,293	\$4,858	\$4,858	\$4,858					\$16,867
26	IT Support				\$1,981	\$4,198	\$4,198	\$4,198					\$14,575
27	Current Member Database				\$8,901	\$18,865	\$18,865	\$18,865					\$65,496
28	CPA - Program Admin				\$2,305	\$4,885	\$4,885	\$4,885					\$16,960
29													
30													
31	OTHER												
32	Housing				\$882,299	\$1,560,684	\$1,360,684	\$1,260,684					\$5,064,351
33	Subsidies (No												
34	Indirect)												
35	TOTAL OPERATING EXPENSE				\$28,941	\$61,287	\$61,287	\$61,287					\$212,802
36													
37	HSA #3												9/23/2020

APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE

SELF HELP FOR THE ELDERLY

LONG TERM HOUSING SUBSIDY FOR OLDER ADULTS AND ADULTS WITH DISABILITIES

January 1, 2021 through June 30, 2024

I. Purpose of Grant

Older adults and adults with disabilities face an ongoing struggle to maintain stable housing in San Francisco due to increasing rents and a limited supply of safe, affordable housing.

By providing housing subsidies this grant prevents homelessness by identifying older adults and adults with disabilities in unstable housing situations and stabilizes that housing.

II. Definitions

Adult with a Disability	A person 18 to 59 years of age living with a disability.
AMI	Area Median Income for the area containing San Francisco is a figure established by the United States Department of Housing and Urban Development on an annual basis. The City of San Francisco’s Mayor’s Office on Housing (sf-moh.org) publishes an AMI chart each year.
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
Controller	Controller of the City and County of San Francisco or designated agent.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment.

Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
Grantee	Self Help for the Elderly
HIV/AIDS	Human Immunodeficiency Virus/Acquired Immune Deficiency Syndrome
HSA	Human Services Agency of the City and County of San Francisco
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years or older, used interchangeably with senior
OCP	Office of Community Partnerships (previously Office on the Aging/OCP)
Purchaser	Director of Purchasing of the City and County of San Francisco, or designated agent
Senior	Person who is 60 years or older, used interchangeably with older adult
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)

Unduplicated Consumer (UDC) A unique consumer receiving a housing subsidy services and reflected via enrollment in CA GetCare.

III. Target Population

Individuals 60 years of age or older or individuals between 18 and 59 years of age that are living with disabilities. Services must target clients who are members of one or more of the following groups that are identified as demonstrating the greatest economic and social need.

In particular:

- Non or limited –English speaking
- Minority
- Frail
- Lesbian/Gay/Bisexual/Transgender/Queer
- Living with HIV/AIDS

IV. Eligibility for Services

In order to obtain housing subsidy services, an individual must meet the following criteria:

- 1) A resident of San Francisco
- 2) Aged 60 and above, or
- 3) Aged 18 to 59 with a disability
- 4) At an income level of 40% of AMI or below
- 5) Lacking stable housing or at risk for homelessness
- 6) Not currently receiving duplicative housing subsidy services
- 7) Has a need for housing subsidy and is willing to participate in the program

V. Location and Time of Services

Operations are based at Self-Help for the Elderly’s offices at 601 Jackson Street, San Francisco, CA, from 8:30am to 5:15pm, Monday through Friday. The office facilities are fully accessible to seniors and adults with disabilities.

VI. Description of Services

Housing subsidy programs shall include the following five components: Program Infrastructure, Client Identification and Eligibility, Housing Subsidy Payments, Housing Subsidy Recertification, and Case Planning.

1. Program Infrastructure:

- Ability to provide administrative assistance, data entry, database maintenance, processing of invoices, and to make payments to landlords.
- Creation of purchase service contracts and payment policies.
- Program policies and procedures including all accounting procedures and reporting functions needed to administer housing subsidy program.
- A dedicated database to capture care planning, case management, client information tracking, purchased services and dollars spent for clients on housing subsidies.

2. Client Identification and Eligibility:

- Policies and procedures clearly defining eligibility criteria, application, decision and award process, recertification process.
- Clear policies and procedures for waitlists and other program functions as needed.

3. Housing Subsidy Payments:

- Rent subsidies shall average \$800 per household, per month. The subsidy should be set at the lowest possible amount needed to stably maintain the household.
- Rent limits should conform to HUD Fair Market Rents for San Francisco HUD FMR Metro Area.
- A limited number of subsidies above \$800 may be issued, with a maximum subsidy amount of \$1200, in exceptional situations where there is a reasonable possibility that the subsidy may be brought down to the \$800 average within 24 months. During periods where the monthly subsidy is above \$800, clients will undergo recertification every 3 months. No more than 15% of subsidies during the contract year will be over the average of \$800.
- The subsidy amount is determined by each household's income to rent ratio. Thus, the monthly lease agreement the household has entered into will be calculated against each household's monthly income. The goal will be to use the rental subsidy to bring the household income to rent ratio to 30%. In cases where an \$800 monthly subsidy is insufficient to maintain housing, recipients can elect to pay up to 50% of income toward the tenant portion of rent. Only after tenant reaches 50% rent to income ratio will the \$800 goal be waived and subsidy amount increased up to \$1200 with a 50% rent to income ratio.
- For those receiving a subsidy above \$800 clear documentation of their eligibility and need for the increased subsidy should be available, as well as a plan to reduce the subsidy.
- Grantee must clearly demonstrate linkages to existing resources for income and other resources.
- Grantee will work to ensure sub-standard housing issues are addressed. When evaluating potential housing, units with serious code violations must be excluded. At a minimum, an apartment inspection checklist will be utilized to ensure that units meet minimum safety guidelines. If clients are living in sub-standard housing, a subsidy could be used to pay rent on a new unit.
- Ensure that the housing subsidies paid are reasonable, prudent and properly procured.

4. Housing Subsidy Recertification:

- The subsidy must be recertified annually at minimum, and more frequently if there are concerns about the household's non-compliance, lack of progress, or if sub-standard housing or safety issues are present.
- Subsidies will be need-based as opposed to time-limited. The subsidy may be renewed as long as clients are engaged in their identified plan and continue to meet program eligibility requirements.

5. Case Planning:

- Entrance into and maintenance of a case plan or contract will be mandatory and clients must show good faith, verifiable efforts in making progress toward short and long-term goals. These goals include but are not limited to:
 - Actions to increase income and access to other available resources which help lower overall household expenses.
 - Actions to improve credit history and rental stability.
 - Efforts to address behavioral health issues that negatively impact housing stability.
 - Efforts to access more affordable housing, including applying to appropriate wait lists.
- Grantee will be familiar with other community organizations and assist clients in connecting with other organizations as needed.
- Work collaboratively with other community organizations presently working with the client and additional ones who can provide specific expertise.
- Grantee may also enhance the subsidy model described with additional components that will be effective in achieving successful outcomes.

VII. Service Objectives

For the period January 1, 2021 to June 30, 2021, the Grantee will meet the following service objectives:

- Provide rental subsidy for at least **40** unduplicated consumers.
- Provide **200** months of housing subsidies. A unit of service is one monthly subsidy payment.
- Transition at least **3** unduplicated consumers off of rental subsidy.

For the period July 1, 2021 to June 30, 2022, the Grantee will meet the following service objectives:

- Provide rental subsidy for at least **55** unduplicated consumers.
- Provide **500** months of housing subsidies. A unit of service is one monthly subsidy payment.
- Transition at least **3** unduplicated consumers off of rental subsidy.

For the period July 1, 2022 to June 30, 2023, the Grantee will meet the following service objectives:

- Provide rental subsidy for at least **55** unduplicated consumers.

- Provide **600** months of housing subsidies. A unit of service is one monthly subsidy payment.
- Transition at least **3** unduplicated consumers off of rental subsidy.

For the period July 1, 2023 to June 30, 2024, the Grantee will meet the following service objectives:

- Provide rental subsidy for at least **60** unduplicated consumers.
- Provide **700** months of housing subsidies. A unit of service is one monthly subsidy payment.
- Transition at least **3** unduplicated consumers off of rental subsidy.

VIII. Outcome Objectives

On an annual basis and as needed, Grantee will report progress towards meeting the following outcome objectives:

A. Housing Retention Outcomes

- At least **85%** of clients will remain stably housed 6 months after assistance begins.
- At least **75%** of clients will remain stably housed 12 months after assistance begins.
- At least **50%** of clients leaving subsidy program will remain stably housed 6 months after assistance ends.

B. Client Satisfaction Outcomes

- At least **65%** of program participants will complete and return satisfaction surveys.
- At least **75%** of participants indicate excellent or good in rating the quality of services they receive,
- At least **75%** of consumers who receive housing subsidy report that the subsidy was able to help keep them housed stably,

IX. Reporting Requirements

- A. The Grantee will enter consumers' data into the CA GetCare database system.
- B. The Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- C. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- D. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- E. Grantee will submit response rates and aggregated data from annual consumer survey to Office of Community Partnerships staff by March 15th of each grant year.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system.

- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- H. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as required by state and local law. The due date for submitting the annual summary report is July 10th.
- I. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- J. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- K. Apart from reports to be sent via email to the Program Analyst and/or Contract Manager, all other reports and communications should be sent to the following addresses:

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

Rick Appleby
DAS, Office on the Aging
P.O. Box 7988
San Francisco, CA 94120
Rick.Appleby@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA Getcare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting, evidence that program staff have completed the California Department of Aging (CDA) Security Awareness Training; program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance, and HIPAA compliance.

	A	B	C	D	E	F
1	Appendix B, Page 1					
2						
3	HUMAN SERVICES AGENCY BUDGET SUMMARY					
4	BY PROGRAM					
5	Name		Term			
6	Agency Name SELF-HELP FOR THE ELDERLY		1/1/20-6/30/24			
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
8	If modification, Effective Date of Mod.		No. of Mod.			
9	Program: LONG-TERM HOUSING SUBSIDIES					
10	Budget Reference Page No.(s)					Total
11	Program Term	1/1/21-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	1/1/21-6/30/24
12	Expenditures					
13	Salaries & Benefits	\$87,347	\$174,694	\$188,838	\$188,838	\$639,717
14	Operating Expenses	\$7,900	\$13,400	\$13,400	\$13,400	\$48,100
15	Subtotal	\$95,247	\$188,094	\$202,238	\$202,238	\$687,817
16	Indirect Percentage (%)	15%	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$14,287	\$28,214	\$30,336	\$30,336	\$103,173
18	Subcontractor/Capital Expenditures	\$2,400	\$0	\$0	\$0	\$2,400
19	Housing Subsidies	\$138,066	\$383,692	\$467,426	\$517,426	\$1,506,610
20	Total Expenditures	\$250,000	\$600,000	\$700,000	\$750,000	\$2,300,000
21	HSA Revenues					
22	General Fund	\$250,000	\$600,000	\$700,000	\$750,000	\$2,300,000
23						
24						
25						
26						
27						
28						
29						
30	TOTAL HSA REVENUES	\$250,000	\$600,000	\$700,000	\$750,000	\$2,300,000
31	Other Revenues					
32						
33						
34						
35						
36						
37	Total Revenues	\$250,000	\$600,000	\$700,000	\$750,000	\$2,300,000
38	Full Time Equivalent (FTE)					
40	Prepared by: Leny Nair	Telephone No.: (415) 677-7682			12/18/2020	
41	HSA-CO Review Signature: _____					
42	HSA #1					6/20/2018

	A	B	C	D	E	F	G	H	I
1	Appendix B, Page 3								
2									
3	Agency Name SELF-HELP FOR THE ELDERLY								
4	Program: LONG-TERM HOUSING SUBSIDIES								
5									
6									
7	Operating Expense Detail								
8									
9									
10									
11	TOTAL								
12	<u>Expenditure Category</u>	TERM	1/1/21-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	1/1/21-6/30/24		
13	Rental of Property		\$2,500	\$5,000	\$5,000	\$5,000	\$17,500		
14	Utilities(Elec, Water, Gas, Phone, Garbage)		\$600	\$1,200	\$1,200	\$1,200	\$4,200		
15	Office Supplies, Postage Building Maintenance Supplies and		\$500	\$500	\$500	\$500	\$2,000		
16	Printing and Reproduction		\$750	\$1,000	\$1,000	\$1,000	\$3,750		
17	Insurance		\$1,000	\$1,000	\$1,000	\$1,000	\$4,000		
18	Staff Training		\$1,000	\$2,000	\$2,000	\$2,000	\$7,000		
19	Staff Travel- (Local & Out of Town)		\$200	\$300	\$300	\$300	\$1,100		
20	Rental of Equipment		\$250	\$500	\$500	\$500	\$1,750		
21			\$200	\$400	\$400	\$400	\$1,400		
22									
23	CONSULTANTS								
24									
25									
26									
27	OTHER								
28	Recruitment Expenses		\$300	\$300	\$300	\$300	\$1,200		
29	Communication (Cellphones & internet)		\$600	\$1,200	\$1,200	\$1,200	\$4,200		
30	Housing Subsidies (No Indirect)		\$138,066	\$383,692	\$467,426	\$517,426	\$1,506,610		
31									
32	TOTAL OPERATING EXPENSE		\$ 7,900	\$ 13,400	\$ 13,400	\$ 13,400	\$48,100		
33									
34	HSA #3							6/20/2018	

	A	B	C	D	E	F	G
1	Appendix B, Page 4						
2							
3	Agency Name SELF-HELP FOR THE ELDERLY						
4	Program: LONG-TERM HOUSING SUBSIDIES						
5							
6							
7							
8	Subcontractor/Capital Expenditures						
9							
10	SUBCONTRACTORS		1/1/21-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	1/1/21-6/30/24
11	Subcontractor 1						
12	Subcontractor 2						
13							
14							
15							
16	TOTAL SUBCONTRACTOR COST		\$0	\$0	\$0	\$0	\$0
17							
18							
19	EQUIPMENT		TERM	1/1/21-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24
20	Units	ITEM/DESCRIPTION					
21	2	Desktops & printer	\$2,400				
22							
23							
24							
25	TOTAL EQUIPMENT COST		\$2,400	\$0	\$0	\$0	\$2,400
26							
27	REMODELING		1/1/21-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	1/1/21-6/30/24
28	Description:						
29	Remodel A						
30							
31							
32	TOTAL REMODELING COST		\$0	\$0	\$0	\$0	\$0
33							
34	TOTAL SUBCONTRACTOR/CAPITAL EXPENDITURE		\$2,400	\$0	\$0	\$0	\$2,400
35							
36	HSA #4						6/20/2018