



**SAN FRANCISCO  
HUMAN SERVICES AGENCY**

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](http://www.SFHSA.org)

**MEMORANDUM**

**TO:** HUMAN SERVICES COMMISSION

**THROUGH:** TRENT RHORER, EXECUTIVE DIRECTOR

**FROM:** DAN KAPLAN, DEPUTY DIRECTOR FOR  
ADMINISTRATION & FINANCE  
ESPERANZA ZAPIEN, DIRECTOR OF CONTRACTS

**DATE:** JUNE 18, 2021

**SUBJECT:** GRANT RENEWAL: **BAY AREA LEGAL AID** (NON-PROFIT) TO PROVIDE VARIOUS SERVICES (*see table below*)

**TERM(S):** JULY 1, 2021 TO JUNE 30, 2023

**AMOUNTS:** *See table on page 2.*

<u>Funding Source</u>	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
<b>FUNDING:</b>	\$436,221	\$788,764	\$368,775	\$159,376	\$1,753,136
<b>PERCENTAGE:</b>	28%	49%	23%		100%

DS  
JG



**London Breed**  
Mayor

**Trent Rhorer**  
Executive Director

The Department of Benefits and Family Support (BFS) requests authorization to renew the grant with Bay Area Legal Aid for the period of July 1, 2021 through June 30, 2023, in an amount of \$1,593,760, plus a 10% contingency for a total amount not to exceed \$1,753,136. The purpose of the grant is to provide Individualized Legal Support Services (ILSS) and SSI Advocacy.

<b>Program</b>	<b>Previous Annual Amount</b>	<b>7/1/2021 - 6/30/2022</b>	<b>7/1/2022 - 6/30/2023</b>	<b>Contract Amount</b>	<b>Contingency</b>	<b>Total Amount</b>
ILSS	\$312,457	\$312,457	\$312,457	\$624,914	\$62,491	\$687,405
HDAP SSI Advocacy	\$130,211	\$348,673	\$348,673	\$697,346	\$69,735	\$767,081
SSI Advocacy		\$271,500	\$0	\$271,500	\$27,150	\$298,650
<b>Totals:</b>	<b>\$656,607</b>	<b>\$932,630</b>	<b>\$661,130</b>	<b>\$1,593,760</b>	<b>\$159,376</b>	<b>\$1,753,136</b>

### **Background**

CalWORKs, CAAP, and CalFresh participants often need legal services to resolve issues that prevent them from entering an employment activity, being employed or retaining employment. Individualized Legal Support Services identifies and addresses these employment barriers.

Many clients who have a physical and/or mental health condition(s) that may qualify them for Supplemental Security Income (SSI) or Social Security Disability Insurance (SSDI) need help navigating the Social Security application process. SSI Advocacy assists clients through the process of applying for Social Security and/or the appeal process, with the ultimate goal of obtaining an SSI/SSDI approval.

### **Services to be Provided**

The Individualized Legal Support Services will assist participants with identified legal barriers that may impede their successful transition from welfare to work. The project at large is staffed with multi and bilingual/bicultural advocates, attorneys, and interpreters who are experienced in providing legal services in English and other key languages, such as Spanish and Chinese. Grantee will provide either full service individualized legal support services or complete simple legal transactions for a total of 350 client matters.

Grantee will also provide SSI Advocacy including legal services and social worker services in order to help individuals participating in HDAP and in the SSI Advocacy Pilot apply for and qualify for Social Security Disability Insurance benefits, Supplemental Security Income, and/or the state's Cash Assistance Program for Immigrants (CAPI) benefits. Grantee will serve 60 HDAP participants and 70 Pilot participants.

**Grantee Selection**

Grantee was selected through Request for Proposals #788, which was competitively bid in March 2018.

**Funding**

This grant will be funded entirely through County General Funds.

**ATTACHMENTS**

Appendix A: ILSS Scope

Appendix B: ILSS Budget

Appendix A-1: HDAP & SSI Advocacy Scope

Appendix B-1: HDAP Budget

Appendix B-2: SSI Advocacy Budget

**Appendix A**  
**Services to be Provided**  
**Bay Area Legal Aid**  
**Individualized Legal Support Services (ILSS)**  
**July 1, 2021 to June 30, 2023**

**I. Purpose of Grant**

This grant will provide direct legal services to participants of the CAAP, CalWORKs, CalFresh, and Medi-Cal programs. The Individualized Legal Support Services will assist participants with identified legal barriers that threaten the individual's path towards self-sufficiency, ability to secure or retain employment. Services funded through this grant will be made available in English, Spanish, Cantonese and Mandarin, and other languages as needed.

**II. Definitions**

ABAWD	Able-Bodied Adults Without Dependents, i.e., CalFresh recipients age 18 to 49 who are able to work and do not share a household with a minor child.
CAAP	County Adult Assistance Programs
CalWORKs	California Work Opportunity and Responsibility to Kids welfare-to-work program for families receiving Temporary Aid to Needy Families (TANF) cash aid.
CalFresh	Formerly known as Food Stamps. A federal public assistance program that helps children and low-income households improve their diets by providing access to a nutritious diet.
CARBON	Contract Administration, Reporting & Billing Online database
Client Matter	Legal issue requiring resolution, correction, mediation, advice & counsel, full service legal support, or legal transactions completed.
Grantee	Bay Area Legal Aid (BayLegal)
HSA, also Department	San Francisco Human Services Agency
ES	HSA Employment Specialist
JobsNOW	A subsidized employment program operated by the SF Human Services Agency Workforce Development Division
Launchpad	Client tracking system used by HSA

Medi-Cal	Free or low-cost health insurance for eligible individuals that comes with a range of health benefits and services
PAES	Personal Assisted Employment Services
RCA	Refugee Cash Assistance Program
Self-referral	Individuals who on their own initiative decides to seek legal services from Grantee
TANF	Temporary Assistance to Needy Families, the federal welfare to work program known as CalWORKs in California
WPR	Work Participation Rate
ZixCorp	An Email Encryption and Email Data Loss Prevention system

### III. Target Population

The target population for Individualized Legal Support Services is residents of San Francisco who

- Receive CalWORKs, CAAP, CalFresh, or Medi-Cal or
- have income at or below 300% of federal poverty level and are experiencing other legal problems related to income stability or employment barriers, and
- either are referred by HSA staff or self-refer

### IV. Description of Services

Grantee shall provide the following services during the term of this grant:

A. Clients are referred to Grantee for services by:

1. HSA staff
2. Self referral must be routed through HSA staff.
3. Exceptions may be made by HSA on a case by case basis.

B. Individualized Legal Support Services

Assist HSA clients who self-refer or who are referred by HSA staff with identified legal barriers that threaten the individual's path towards self-sufficiency, ability to secure or retain employment.

By providing culturally competent, individualized legal support to address the barriers to self-sufficiency that may have a legal remedy, this program component provides participants with free legal services that will enhance the ability of these populations to secure and retain access to employment. Individualized Legal Support Services include but is not limited to:

1. Provide legal advice, support and representation or referrals on a range of topics including but not limited to:
  - a. Employment rights
  - b. Consumer credit and garnishment issues
  - c. Identification such as driver's licenses and birth certificates
  - d. Civil cases
  - e. Criminal case records
  - f. Family cases including domestic violence
  - g. Housing
  - h. Immigration issues, as permitted by regulations, and not limited to such as applications for U & T-Visas
  - i. Health access issues excluding Medi-Cal eligibility
2. Develop an individual plan and action steps to resolve participant's legal problems
3. Full service individualized legal support services--provision of a full scope of services from beginning to end resulting in resolution of barrier(s), which may include but is not limited to:
  - a. Technical support in Pro Per (self-representation) cases
  - b. Representation in legal actions to resolution
4. Simple legal transactions include but is not limited to:
  - a. Completion of forms, written letters and other documents on behalf of the client
  - b. Appropriate referral to other community legal services and non-legal agencies if necessary
5. Provide groups with informational workshops, in virtual format or at HSA or other physical sites, on relevant legal issues related to employment and self-sufficiency as requested by HSA. These workshops may lead to Individualized Legal Support Services.

#### C. Health and Safety in COVID-19 Environment

1. Grantee will follow relevant guidance and protocols from the San Francisco Department of Public Health. See <https://www.sfgdcp.org/infectious-diseases-a-to-z/coronavirus-2019-novel-coronavirus/>
2. All Grantee staff and program participants taking part in in-person activities must observe social distancing protocols and must wear masks and/or other personal protective equipment appropriate to the activity.

## V. Information and Referral

Through Grantee's connections to the community, Grantee will refer potential CalWORKs, CAAP, CalFresh and MediCal clients to HSA to be screened for eligibility.

**VI. Staffing Requirements**

Grantee will provide a supervising legal attorney for supervision and oversight of all staff, including law clerks. Grantee will provide receptionist/translator and secretary/translator capabilities.

**VII. Location and Time of Services**

Services are provided Monday-Friday, during regular business hours (9 a.m. to 5 p.m.) at BayLegal's San Francisco office (1800 Market Street, 3<sup>rd</sup> Floor). Grantee staff shall be available for appointments and client engagement interviews via telephone, email and in-person.

During the COVID-19 Shelter-in-Place order, Grantee will provide services remotely via phone, email, and video conferencing. As San Francisco COVID-19 restrictions ease, in-person services may be provided following safety guidelines.

**VIII. Service Objectives**

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

- A. Provide either full service individualized legal support services or complete simple legal transactions for a total of 350 client matters.
- B. Provide full service individualized legal support services in at least 125 client matters for participants who are referred by HSA staff.
- C. Complete simple legal transactions to at least 225 client matters for participants who are referred by HSA staff.
- D. These numbers are contingent upon HSA referral and subject to adjustment based on client need, after BayLegal discussion with HSA.
- E. A minimum of 6 workshop(s) for HSA staff conducted annually on legal topics agreed upon by Grantee and HSA.
- F. A minimum of 30 in-person or virtual participant workshop(s) conducted annually in conjunction with in-person or virtual HSA workshops whenever possible, on Grantee's individualized legal support services and legal topics agreed upon by Grantee and HSA. In-person or virtual workshops conducted for staff of community partner organizations, who will disseminate information to clients enrolled in HSA-administered public benefits programs will also count towards this service objective.

**IX. Outcome Objectives**

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

- A. 50% of all client matters will address an identified legal barrier directly connected to employment.

- B. 70% of client matters for participants receiving full service individualized legal services will have all identified legal problems resolved within 90 days.
- C. 90% of client matters for participants having simple legal transactions completed will have all identified legal problems resolved or addressed through advice & counsel, brief services, or direct representation. A participant will be considered to have completed the service when an identified legal barrier has been resolved or addressed through advice & counsel, brief services, or direct representation within 30 days.
- D. In order to assess client satisfaction and to identify areas for project improvement, upon closure of a case, Grantee will send an evaluation form to all participants whose cases were accepted for Individualized Legal Support Services to solicit feedback on the services provided. Results from the returned evaluations will be compiled and reported to SF HSA at the end of the grant cycle, with a minimum of 90% of those responding will rate the accessibility, timeliness and effectiveness of services in resolving the concern/issue at least 3 or above on a five-point scale.

**X. Reporting Requirements**

- A. Monthly Reports. HSA will generate monthly reports from Launchpad database by the 10th day following the reporting month. Grantee must review and make Launchpad data corrections in a timely manner. Grantee will submit monthly reports regarding grant performance. Grantee is responsible for presenting cases that are accurate in content. Reports will follow the format as follows:  
Provide detailed information for each individual client seen that month. The detailed information will include case number, client zip code, client ethnicity, gender, HSA worker name and unit number of worker referring client, description of client's legal problem(s), services provided, meeting date(s), and issue outcome or status as of 30 and 90 days and at final disposition as applicable.
- B. Reporting on services will be entered in Launchpad data system.
- C. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VIII & IX- Service and Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Annual Reports summarizing the contract activities will be submitted directly to Contracts Monitor by the 15th of the month following the end of the program year.
- D. Grantee will enter the mid-year SOGI aggregate data by January 15<sup>th</sup>, and annual SOGI aggregate data in the CARBON database by the 15th of the month following the end of the program year.
- E. Grantee will provide an annual participant satisfaction survey report to HSA by March 15 each grant year which reports the total percentage of clients served who responded to the survey as well as survey outcomes.



- F. E-mail communication that contains client confidential information (as agreed upon in writing by the client) shall be transmitted via Grantee's e-mail program through a secured method approved by HSA or by using ZixCorp.
- G. Grantee will provide Ad Hoc reports as required by the Department.
- H. For assistance with reporting requirements or submission of reports, contact:

Elizabeth Leone@sfgov.org  
Senior Contract Manager, Office of Contract Management  
or  
Adriana.Duran@sfgov.org  
Program Monitor, Welfare to Work Division

**XI. Monitoring Activities**

- A. Program Monitoring: Program monitoring will include review of client eligibility, and back-up documentation for reporting progress towards meeting service and outcome objectives.
- 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.

**Appendix A-1  
Services to be Provided  
Bay Area Legal Aid  
SSI Advocacy Services  
July 1, 2021 to June 30, 2023**

**I. Purpose of Grant**

The SSI Advocacy Services will assist individuals experiencing homelessness or at serious risk of homelessness connect to SSI/SSDI benefits. The Grantee will provide legal services and social worker services in order to help individuals participating in the SSI Advocacy Pilot and the HDAP SSI Advocacy program apply for and qualify for Social Security Disability Insurance benefits, Supplemental Security Income, and / or the state's Cash Assistance Program for Immigrants (CAPI) benefits. Services funded through this grant will be made available in English, Spanish, Cantonese and Mandarin, and other languages as needed.

The SSI Advocacy Pilot services will be provided for one year, July 2021-June 2022, while the HDAP SSI Advocacy will be provided for the full 2 year term.

**II. Definitions**

CAAP	County Adult Assistance Programs
CalWORKs	California Work Opportunity and Responsibility to Kids welfare-to-work program for families receiving Temporary Aid to Needy Families (TANF) cash aid.
CalFresh	Formerly known as Food Stamps. A federal public assistance program that helps children and low-income households improve their diets by providing access to a nutritious diet.
CAPI	Cash Assistance Program for Immigrants. A state-funded program designed to provide monthly cash benefits to aged, blind, and disabled non-citizens who are ineligible for SSI/SSP solely due to their immigrant status
CARBON	Contract Administration, Reporting & Billing Online database
CBO	Community Based Organization
ES	HSA Employment Specialist
Grantee	Bay Area Legal Aid (BayLegal)
HDAP	Housing Disability Advocacy Program

HSA, also Department	San Francisco Human Services Agency
Launchpad	Client tracking system used by HSA
Medi-Cal	Free or low-cost health insurance for eligible individuals that comes with a range of health benefits and services
PAES	Personal Assisted Employment Services
Self-referral	Individuals who on their own initiative decides to seek legal services from Grantee
TANF	Temporary Assistance to Needy Families, the federal welfare to work program known as CalWORKs in California
ZixCorp	An Email Encryption and Email Data Loss Prevention system

### **III. Target Population**

The target population for SSI Advocacy Pilot is individuals experiencing homelessness or at serious risk of homelessness who continuing participation in the SSI Advocacy Pilot.

The target population for HDAP SSI Advocacy Program is residents of San Francisco who are in COVID-19 shelter, currently at Alternative Housing Site 10 and referred by HSA.

### **IV. Description of Services**

Grantee shall provide the following services during the term of this grant:

- A. Offer legal services and social worker services to help individuals apply for, appeal for, and qualify for Social Security Disability Insurance benefits, Supplemental Security Income, and/or the state's Cash Assistance Program for Immigrants (CAPI) benefits.
- B. Assist individuals in applying for federal or state disability benefits, as well as Social Security retirement benefits, if eligible.
- C. Provide legal assistance to advocate for submitted claims to be approved.
- D. Represent clients at all stages of the administrative and appeals process, from initial application, through reconsideration, administrative hearings, Appeals Council review, and federal district court.
- E. Provide case management services, assistance with applying for public benefits and securing federal economic impact payments, and referral for other civil legal services.
- F. Grantee will provide attorney supervision and oversight of all staff, including law clerks. Grantee will provide support staff/translator capabilities.
- G. Health and Safety in COVID-19 Environment

- a) Grantee will follow relevant guidance and protocols from the San Francisco Department of Public Health. See <https://www.sfcddp.org/infectious-diseases-a-to-z/coronavirus-2019-novel-coronavirus/>
- b) All Grantee staff and program participants taking part in in-person activities must observe social distancing protocols and must wear masks and/or other personal protective equipment appropriate to the activity.

**In addition to the above, for HDAP SSI Advocacy Program only:**

- A. Coordinate services through SF City/County and CBO staff at Alternative Housing Site 10, the Civic Center Navigation Center, and other potential sites to be mutually agreed upon.
- B. Represent clients at all stages of the administrative and appeals process, from initial application, through reconsideration, administrative hearings, Appeals Council review, and federal district court, as well as reinstatements, recertifications, and advocating with SSA on behalf of clients.
- C. Outreach to clients and coordinate services with case management, housing, and healthcare providers.

**V. Information and Referral**

Through Grantee's connections to the community, Grantee will refer potential CalWORKs, CAAP, CalFresh, CAPI and MediCal or other HSA administered benefits clients to HSA to be screened for eligibility.

**VI. Location and Time of Services**

Services are provided Monday-Friday, during regular business hours (9 a.m. to 5 p.m.) at BayLegal's San Francisco office (1800 Market Street, 3<sup>rd</sup> Floor). Grantee staff shall be available for appointments and client engagement interviews.

During the COVID-19 Shelter-in-Place order, Grantee will provide services remotely via phone, email, and video conferencing. As San Francisco COVID-19 restrictions ease, in-person services may be provided following safety guidelines.

**VII. Service Objectives**

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

- A. For FY21/22 only, provide SSI Advocacy Pilot services to up to 70 individuals
- B. Provide HDAP SSI Advocacy to up to 60 individuals

**VIII. Outcome Objectives**

Given that the Social Security Administration is experiencing a significant backlog in the processing of claims, based on current SSA pace and capacity, Grantee will meet the following annual outcome objectives:

- A. For FY21/22 only, 30% of SSI Advocacy Pilot cases are projected to resolve and close , 85% of which will have a favorable outcome (approval of SSI application)
- B. 20% of HDAP cases are projected to resolve and close over the next year, 85% of which will have a favorable outcome (approval of SSI application, increase in benefits, etc.)
- C. In order to assess client satisfaction and to identify areas for project improvement, Grantee will send an evaluation form to all participants to solicit feedback on the services provided. Results from the returned evaluations will be compiled and reported to SF HSA at the end of the grant cycle, with a minimum of 90% of those responding will rate the accessibility, timeliness and effectiveness of services at least 3 or above on a five-point scale.

### **IX. Reporting Requirements**

- A. Monthly Reports – **HDAP**. Grantee will provide data to SFHSA each month for HDAP clients that include the following information: intake date, client name, SSN, date application was submitted, application level, date of approval or final denial, date closed, closed reason, housing status at closure. Grantee is responsible for presenting cases that are accurate in content.
- B. Quarterly Reports – **SSI Pilot**. Grantee will copy SFHSA on quarterly data and narrative reports submitted to Tipping Point Community, providing updates on cases completed, benefits to clients, challenges encountered, and status of ongoing cases.
- C. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VIII & IX- Service and Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Annual Reports summarizing the contract activities will be submitted directly to Contracts Monitor by the 15th of the month following the end of the program year.
- D. Grantee will enter the mid-year SOGI aggregate data by January 15<sup>th</sup>, and annual SOGI aggregate data in the CARBON database by the 15th of the month following the end of the program year.
- E. E-mail communication that contains client confidential information (as agreed upon in writing by the client) shall be transmitted via Grantee’s e-mail program through a secured method approved by HSA or by using ZixCorp.
- F. Grantee will provide Ad Hoc reports as required by the Department.
- G. For assistance with reporting requirements or submission of reports, contact:

Elizabeth Leone@sfgov.org  
Senior Contract Manager, Office of Contract Management  
or

Adriana.Duran@sfgov.org  
Program Monitor, Welfare to Work Division

**X. Monitoring Activities**

- A. Program Monitoring: Program monitoring will include review of client eligibility, and back-up documentation for reporting progress towards meeting service and outcome objectives.
  
- 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.

	A	B	C	D	E	F	G
1					Appendix B, Page 1		
2					Document Date: 6/9/21		
3	<b>HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY</b>						
4	<b>BY PROGRAM</b>						
5	Contractor's Name		Term				
6	<b>BAY AREA LEGAL AID</b>		<b>7/1/2021 - 6/30/2023</b>				
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: <b>Individualized Legal Support Services</b>						
10	Budget Reference Page No.(s)						
11	Program Term	<b>7/1/2021 - 6/30/2022</b>	<b>7/1/2022 - 6/30/2023</b>	Total			
12	<b>Expenditures</b>						
13	Salaries & Benefits	\$233,369	\$232,908	\$466,276			
14	Operating Expense	\$36,208	\$36,753	\$72,961			
15	<b>Subtotal</b>	<b>\$269,577</b>	<b>\$269,661</b>	<b>\$539,237</b>			
16	Indirect Percentage	14%	14%				
17	Indirect Cost	\$42,880	\$42,796	\$85,676			
18	Capital Expenditure						
19	<b>Total Expenditures</b>	<b>\$312,457</b>	<b>\$312,457</b>	<b>\$624,914</b>			
20	<b>HSA Revenues</b>						
21	General Fund	\$153,104	\$153,104	\$306,208			
22	State	\$31,246	\$31,246	\$62,491			
23	Federal	\$128,107	\$128,107	\$256,215			
24							
25							
26							
27							
28							
29	<b>TOTAL HSA REVENUES</b>	<b>\$312,457</b>	<b>\$312,457</b>	<b>\$624,914</b>			
30	<b>Other Revenues</b>						
31							
32							
33							
34							
35							
36	Total Revenues	\$312,457	\$312,457	\$624,914			
37							
39	Prepared by: Michelle Weger		Telephone No.:	510-250-5243			
40	HSA-CO Review Signature: _____				Date 6/9/2021		
41	HSA #1				11/15/2007		

	A	B	C	D	E	F	G	H
1								Appendix B, Page 2
2								Document Date: 6/9/21
3								
4	Program Name: Individualized Legal Support Services							
5	(Same as Line 9 on HSA #1)							
6								
7	<b>Salaries &amp; Benefits Detail</b>							
8								
9								
10								
11								7/1/2021 - 6/30/2022 7/1/2022 - 6/30/2023 7/1/2021-6/30/2023
12		Agency Totals		For HSA Program		For ILSS	For ILSS	TOTAL
		Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary
13	Managing Attorney - SF Office	\$156,605	100%	5.0%	5.0%	\$7,830	\$8,065	\$15,895
14	Supervising Attorney - ILSS	\$110,234	100%	27.0%	27.0%	\$29,763	\$31,251	\$61,014
15	Staff Attorney (Sanderson-Cimino)	\$80,340	100%	60.0%	60.0%	\$48,204	\$50,614	\$98,818
16	Staff Attorney (Pappas)	\$77,220	100%	40.0%	40.0%	\$30,888	\$31,815	\$62,703
17	Staff Attorney to be hired	\$69,925	100%	80.0%	80.0%	\$55,940	\$57,618	\$113,558
18	Advocate (Theisen)	\$85,722	100%	8.5%	8.5%	\$7,286	\$0	\$7,286
19	Support Staff (Li)	\$80,535	100%	7.5%	7.5%	\$6,040	\$6,221	\$12,261
20								
21								
22								
23								
24								
25								
26								
27								
28								
29	TOTALS		7.00	2.28	2.28	\$185,951	\$185,584	\$371,535
30								
31	FRINGE BENEFIT RATE							
32	EMPLOYEE FRINGE BENEFITS	25.5%				\$47,418	\$47,324	\$94,741
33								
34								
35	<b>TOTAL SALARIES &amp; BENEFITS</b>					<b>\$233,369</b>	<b>\$232,908</b>	<b>\$466,276</b>
36	<b>HSA #2</b>							<b>11/15/2007</b>



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1										Appendix B, Page 3					
2										Document Date: 6/9/21					
3															
4		Program Name: Individualized Legal Support Services													
5		(Same as Line 9 on HSA #1)													
6															
7						<b>Operating Expense Detail</b>									
8															
9															
10															
11															
12		Expenditure Category			TERM	<u>7/1/2021-6/30/2022</u>	<u>7/1/2022-6/30/2023</u>	<u>7/1/2021-6/30/2023</u>							
13		Rental of Property				\$28,243	\$28,668	\$56,911							
14		Utilities(Elec, Water, Gas, Phone, Scavenger)				\$3,714	\$3,770	\$7,484							
15		Office Supplies, Postage				\$1,352	\$1,369	\$2,721							
16		Building Maintenance Supplies and Repair													
17		Printing and Reproduction				\$373	\$379	\$752							
18		Insurance				\$1,122	\$1,139	\$2,261							
19		Staff Training													
20		Staff Travel-(Local & Out of Town)													
21		Rental of Equipment				\$1,404	\$1,428	\$2,832							
22		CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE													
23															
24															
25															
26															
27															
28		OTHER													
29															
30															
31															
32															
33															
34															
35		<b>TOTAL OPERATING EXPENSE</b>				<b>\$36,208</b>	<b>\$36,753</b>	<b>\$72,961</b>							
36															
37		HSA #3								11/15/2007					

	A	B	C	D	E	F	G	H
1					Appendix B-1, Page 4			
2					Document Date: 6/9/21			
3								
4		Program Name: Individualized Legal Support Services						
5		(Same as Line 9 on HSA #1)						
6								
7		<b>Capital Expenditure Detail</b>						
8		<b>(Equipment and Remodeling Cost)</b>						
9					TOTAL			
10		EQUIPMENT	TERM	7/1/2021 - 6/30/2022	7/1/2022 - 6/30/2023	7/1/2021-6/30/2023		
11	No.	ITEM/DESCRIPTION						
12								
13								
14								
15								
16								
17								
18								
19		TOTAL EQUIPMENT COST				0		
20								
21		REMODELING						
22		Description:						
23								
24								
25								
26								
27								
28		TOTAL REMODELING COST						
29								
30		TOTAL CAPITAL EXPENDITURE				0		
31		(Equipment and Remodeling Cost)						
32		HSA #4				11/15/2007		

	A	B	C	D
1	Appendix B-1, Page 1			
2	Document Date: 6/9/2021			
3	<b>HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY</b>			
4				
5	Contractor's Name		Term	
6	<b>BAY AREA LEGAL AID</b>		<b>7/1/2021-6/30/2023</b>	
7	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification <input type="checkbox"/>			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	Program: <b>HDAP SSI Advocacy</b>			
10	Budget Reference Page No.(s)			
11	Program Term	<b>7/1/2021 - 6/30/2022</b>	<b>7/1/2022 - 6/30/2023</b>	<b>Total</b>
12	<b>Expenditures</b>			
13	Salaries & Benefits	\$260,779	\$260,779	\$521,558
14	Operating Expense	\$39,977	\$39,977	\$79,954
15	<b>Subtotal</b>	<b>\$300,756</b>	<b>\$300,756</b>	<b>\$601,512</b>
16	Indirect Percentage	14%	14%	
17	Indirect Cost	\$47,917	\$47,917	\$95,834
18	Capital Expenditure			
19	<b>Total Expenditures</b>	<b>\$348,673</b>	<b>\$348,673</b>	<b>\$697,346</b>
20	<b>HSA Revenues</b>			
21	General Fund	\$170,850	\$170,850	\$341,700
22	State	\$34,867	\$34,867	\$69,735
23	Federal	\$142,956	\$142,956	\$285,912
24				
25				
26				
27				
28				
29	<b>TOTAL HSA REVENUES</b>	<b>\$348,673</b>	<b>\$348,673</b>	<b>\$697,346</b>
30	<b>Other Revenues</b>			
31				
32				
33				
34				
35				
36	Total Revenues	\$348,673	\$348,673	\$697,346
37				
39	Prepared by: Michelle Weger	Telephone No.:	510-250-5243	Date 6/9/2021
40	HSA-CO Review Signature: _____			
41	<b>HSA #1</b>			<b>11/15/2007</b>

	A	B	C	D	E	F	G	H
1								Appendix B-1, Page 2
2								Document Date: 6/9/2021
3								
4	Program Name: Individualized Legal Support Services							
5	(Same as Line 9 on HSA #1)							
6								
7	<b>Salaries &amp; Benefits Detail</b>							
8								
9								
10								
11		7/1/2021-6/30/2022			7/1/2022-6/30/2023			
		Agency Totals		For HSA Program		For HDAP SSI Program	For HDAP SSI Program	TOTAL
12	POSITION TITLE	Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary
13	Managing Attorney - SSI	\$121,953	100%	5.077%	5.077%	\$6,192	\$6,192	\$12,384
14	Supervising Attorney - SSI	\$99,216	100%	20.208%	20.208%	\$20,050	\$20,050	\$40,100
15	Staff Attorney (Pappas)	\$77,220	100%	50.117%	50.117%	\$38,700	\$38,700	\$77,400
16	Staff Attorney (Wolchansky)	\$94,731	100%	37.580%	37.580%	\$35,600	\$35,600	\$71,200
17	Staff Attorney (Castro)	\$78,663	100%	62.609%	62.609%	\$49,250	\$49,250	\$98,500
18	Advocate (Tien)	\$85,430	100%	20.016%	20.016%	\$17,100	\$17,100	\$34,200
19	Social Worker	\$94,419	100%	30.079%	30.079%	\$28,400	\$28,400	\$56,800
20	Support Staff (Li)	\$80,535	100%	15.521%	15.521%	\$12,500	\$12,500	\$25,000
21								
22								
23								
24								
25								
26								
27								
28								
29								
30	TOTALS		8.00	2.41	2.41	\$207,792	\$207,792	\$415,584
31								
32	FRINGE BENEFIT RATE							
33	EMPLOYEE FRINGE BENEFITS	25.5%				\$52,987	\$52,987	\$105,974
34								
35								
36	<b>TOTAL SALARIES &amp; BENEFITS</b>					<b>\$260,779</b>	<b>\$260,779</b>	<b>\$521,558</b>
37	<b>HSA #2</b>							<b>11/15/2007</b>

	A	B	C	D	E	F	G	H	I
1									Appendix B, Page 3
2									Document Date: 6/9/2021
3									
4	Program Name: Individualized Legal Support Services								
5	(Same as Line 9 on HSA #1)								
6									
7	<b>Operating Expense Detail</b>								
8									
9									
10									
11									<b>TOTAL</b>
12	<u>Expenditure Category</u>			TERM	<u>7/1/2021 - 6/30/2022</u>		<u>7/1/2022 - 6/30/2023</u>		<u>7/1/2021 - 6/30/2023</u>
13	Rental of Property				\$24,034		\$24,034		\$48,068
14	Utilities(Elec, Water, Gas, Phone, Scavenger)				\$4,355		\$4,355	\$	8,710
15	Office Supplies, Postage				\$1,791		\$1,791	\$	3,582
16	Building Maintenance Supplies and Repair								
17	Printing and Reproduction							\$	-
18	Insurance				\$1,315		\$1,315	\$	2,630
19	Staff Training								
20	Staff Travel-(Local & Out of Town)								
21	Rental of Equipment				\$1,882		\$1,882	\$	3,764
22	CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE								
23									
24									
25									
26									
27									
28	OTHER								
29	Litigation costs (client psychological evaluations)				\$6,000		\$6,000	\$	12,000
30	Local travel - staff/clients				\$600		\$600	\$	1,200
31									
32									
33									
34									
35	<b>TOTAL OPERATING EXPENSE</b>				<b>\$39,977</b>		<b>\$39,977</b>		<b>\$79,954</b>
36									
37	<b>HSA #3</b>								<b>11/15/2007</b>

	A	B	C	D	E	F
1						Appendix B-1, Page 4
2						Document Date: 6/9/2021
3						
4		Program Name: Individualized Legal Support Services				
5		(Same as Line 9 on HSA #1)				
6						
7						
8						
9						
						TOTAL
10	EQUIPMENT	TERM	10/1/2020-6/30/2021	7/1/2021-6/30/2022	7/1/2022-6/30/2023	
11	No.	ITEM/DESCRIPTION				
12						0
13						
14						
15						
16						
17						
18						
19						
20	TOTAL EQUIPMENT COST		0	0	0	0
21						
22	REMODELING					
23	Description:					
24						
25						
26						
27						
28						
29	TOTAL REMODELING COST					
30						
31	TOTAL CAPITAL EXPENDITURE		0	0	0	0
32	(Equipment and Remodeling Cost)					
33	HSA #4					11/15/2007

	A	B	C
1	Appendix B-2, Page 1 Document Date: 6/9/2021		
2			
3			
4			
<b>HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY</b>			
5	Contractor's Name	Term	
6	<b>BAY AREA LEGAL AID</b>	<b>7/1/2021 - 6/30/2022</b>	
7	(Check One) <input type="checkbox"/> 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: <b>SSI Advocacy</b>		
10	Budget Reference Page No.(s)		
11	Program Term	<b>7/1/2021 - 6/30/2022</b>	<b>Total</b>
12	<b>Expenditures</b>		
13	Salaries & Benefits	\$206,261	\$206,261
14	Operating Expense	\$27,340	\$27,340
15	<b>Subtotal</b>	<b>\$233,601</b>	<b>\$233,601</b>
16	Indirect Percentage	14%	
17	Indirect Cost	\$37,899	\$37,899
18	Capital Expenditure		
19	<b>Total Expenditures</b>	<b>\$271,500</b>	<b>\$271,500</b>
20	<b>HSA Revenues</b>		
21	General Fund	\$133,035	\$133,035
22	State	\$27,150	\$27,150
23	Federal	\$111,315	\$111,315
24			
25			
26			
27			
28			
29	<b>TOTAL HSA REVENUES</b>	<b>\$271,500</b>	<b>\$271,500</b>
30	<b>Other Revenues</b>		
31			
32			
33			
34			
35			
36	Total Revenues	\$271,500	\$271,500
37			
39	Prepared by: Michelle Weger	510-250-5243	Date 6/9/2021
40	HSA-CO Review Signature:		
41	<b>HSA #1</b>		<b>11/15/2007</b>

	A	B	C	D	E	F	G
1							Appendix B-2, Page 2
2							Document Date: 6/9/2021
3							
4	Program Name: Individualized Legal Support Services						
5	(Same as Line 9 on HSA #1)						
6							
7	<b>Salaries &amp; Benefits Detail</b>						
8							
9							
10							7/1/2021 - 6/30/2022
11		Agency Totals		For HSA Program		For DHS Program	TOTAL
12	POSITION TITLE	Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	Budgeted Salary	7/1/18 - 6/30/21
13	Managing Attorney - SSI	\$121,953	100%	3.268%	3.268%	\$3,986	\$3,986
14	Supervising Attorney - SSI	\$99,216	100%	51.343%	51.343%	\$50,940	\$50,940
15	Staff Attorney (Wolchansky)	\$94,731	100%	39.877%	39.877%	\$37,776	\$37,776
16	Staff Attorney (Castro)	\$78,663	100%	23.358%	23.358%	\$18,374	\$18,374
17	Social Worker	\$94,419	100%	44.828%	44.828%	\$42,326	\$42,326
18	Support Staff (Li)	\$80,535	100%	13.595%	13.595%	\$10,949	\$10,949
19							
20							
21							
22							
23							
24							
25							
26							
27	TOTALS		6.00	1.76	1.76	\$164,351	\$164,351
28							
29	FRINGE BENEFIT RATE						
30	EMPLOYEE FRINGE BENEFITS	25.5%				\$41,910	\$41,910
31							
32							
33	<b>TOTAL SALARIES &amp; BENEFITS</b>					<b>\$206,261</b>	<b>\$206,261</b>
34	<b>HSA #2</b>						<b>11/15/2007</b>



	A	B	C	D	E	F	G
1	Appendix B-2, Page 3						
2	Document Date: 6/9/2021						
3							
4	Program Name: Individualized Legal Support Services						
5	(Same as Line 9 on HSA #1)						
6							
7	<b>Operating Expense Detail</b>						
8							
9							
10							
11							
12	<u>Expenditure Category</u>				TERM <u>7/1/2021 - 6/30/2022</u>		<u>TOTAL</u>
13	Rental of Property				\$20,677		\$20,677
14	Utilities(Elec, Water, Gas, Phone, Scavenger)				\$3,196		\$ 3,196
15	Office Supplies, Postage				\$1,272		\$ 1,272
16	Building Maintenance Supplies and Repair						
17	Printing and Reproduction						
18	Insurance				\$1,023		\$ 1,023
19	Staff Training						
20	Staff Travel-(Local & Out of Town)						
21	Rental of Equipment				\$1,172		\$ 1,172
22	CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE						
23							
24							
25							
26							
27							
28	OTHER						
29	Litigation costs (client psychological evaluations)						
30	Local travel - staff/clients						
31							
32							
33							
34							
35	<b>TOTAL OPERATING EXPENSE</b>				<b>\$27,340</b>		<b>\$27,340</b>
36							
37	<b>HSA #3</b>						<b>11/15/2007</b>

	A	B	C	D	E	F
1						Appendix B-1, Page 1
2						Document Date: 6/9/2021
3						
4		Program Name: Individualized Legal Support Services				
5		(Same as Line 9 on HSA #1)				
6						
7						
8						
9						
10						TOTAL
		EQUIPMENT	TERM	#REF!	#REF!	7/1/2021 - 6/30/2022
11	No.	ITEM/DESCRIPTION				
12						
13						
14						
15						
16						
17						
18						
19						
20		TOTAL EQUIPMENT COST				
21						
22		REMODELING				
23		Description:				
24						
25						
26						
27						
28						
29		TOTAL REMODELING COST				
30						
31		TOTAL CAPITAL EXPENDITURE		0		0
32		(Equipment and Remodeling Cost)				
33		HSA #4				11/15/2007