



**SAN FRANCISCO
HUMAN SERVICES AGENCY**

Department of Benefits
and Family Support

Department of Disability
and Aging Services

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



London Breed
Mayor

Trent Rhorer
Executive Director

MEMORANDUM

TO:	HUMAN SERVICES COMMISSION										
THROUGH:	TRENT RHORER, EXECUTIVE DIRECTOR										
FROM:	SUSIE SMITH, DEPUTY DIRECTOR, POLICY, PLANNING, & PUBLIC RELATIONS ESPERANZA ZAPIEN, DIRECTOR OF CONTRACTS										
DATE:	JUNE 16, 2023										
SUBJECT:	NEW GRANT: BAY AREA LEGAL AID (NON-PROFIT) FOR PROVISION OF HOUSING DISABILITY & ADVOCACY PROGRAM (HDAP) SERVICES										
GRANT TERM:	7/1/23-6/30/25										
GRANT AMOUNT:	<table border="0"> <tr> <td><u>New</u></td> <td><u>Contingency</u></td> <td><u>Total</u></td> </tr> <tr> <td>\$3,783,374</td> <td>\$378,337</td> <td>\$4,161,712</td> </tr> </table>	<u>New</u>	<u>Contingency</u>	<u>Total</u>	\$3,783,374	\$378,337	\$4,161,712				
<u>New</u>	<u>Contingency</u>	<u>Total</u>									
\$3,783,374	\$378,337	\$4,161,712									
ANNUAL AMOUNT:	\$1,891,687										
FUNDING:	<table border="0"> <tr> <td><u>County</u></td> <td><u>State</u></td> <td><u>Federal</u></td> <td><u>Contingency</u></td> <td><u>Total</u></td> </tr> <tr> <td></td> <td>\$3,783,374</td> <td></td> <td>\$378,337</td> <td>\$4,161,712</td> </tr> </table>	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>		\$3,783,374		\$378,337	\$4,161,712
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	\$3,783,374		\$378,337	\$4,161,712							
PERCENTAGE:	<table border="0"> <tr> <td></td> <td>100%</td> <td></td> <td></td> <td>100%</td> </tr> </table>		100%			100%					
	100%			100%							

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6

The Homeless Benefits Linkages Program requests authorization to enter into a grant with Bay Area Legal Aid for the administration of the Housing Disability and Advocacy Program (HDAP) for the period of July 1, 2023 through June 30, 2025, in an amount of \$3,783,374 plus a 10% contingency for a total amount not to exceed \$4,161,712. The purpose of the grant is to provide SSI (Social Security Income) Advocacy and other services to eligible single adults who are currently experiencing homelessness.

Background

Many people experiencing homelessness and have a physical and/or mental health condition(s) that may qualify them for SSI or SSDI (Social Security Disability Insurance) need help navigating the lengthy and complex Social Security application process. SSI Advocacy assists clients through the process of applying for Social Security, and if needed the appeals process, with the ultimate goal of SSI/SSDI award.

Services to be Provided

Grantee will provide SSI Advocacy, including legal and social work services in order to help individuals participating in the HDAP apply for and for Social Security Disability Insurance benefits, Supplemental Security Income, Retirement benefits, and/or the state's Cash Assistance Program for Immigrants (CAPI) benefits. Other services include direct outreach, SSI eligibility assessment, housing assistance in partnership with the Department of Homelessness and Supportive Housing (HSH), housing navigation, and case management.

Selection

Grantee was selected through Request for Proposals 1042, which was competitively bid in February 2023.

Funding

Funding for this grant is provided by 100% State funding through a grant from the California Department of Social Services.

ATTACHMENTS

Appendix A – Services to be Provided

Appendix B – Budget

Appendix A: Services to be Provided
Bay Area Legal Aid
Housing and Disability Advocacy Program (HDAP)
July 1, 2023 to June 30, 2025

I. Purpose of Grant

The SSI legal and advocacy services provided by this program 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 HDAP apply for and qualify for or regain 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.

II. Definitions

CAAP	County Adult Assistance Programs
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
CDSS	California Department of Social Services
Grantee	Bay Area Legal Aid (Bay Legal)
HDAP	Housing Disability Advocacy Program
HSA, also Department	San Francisco Human Services Agency
HSH	San Francisco Department of Homelessness and Supportive Housing
Medi-Cal	Free or low-cost health insurance for eligible individuals that comes with a range of health benefits and services

III. Target Population

The target population for HDAP is residents of San Francisco who are experiencing homelessness or at risk of homelessness in a variety of locations, including congregate shelters, Navigation Centers, and Shelter-in-Place (SIP) hotels.

IV. Description of Services

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

- A. Offer legal services and social work services to help individuals re-instate, 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. Legal services may also be provided to assist clients with reinstatements, recertifications, and advocating with SSA on clients' behalf.
- E. Coordinate services through SF City/County and CBO staff at all sites mutually agreed upon by HSA and The Department of Homelessness and Supportive Housing (HSH).
- F. Outreach to clients and coordinate services with case management, housing, and healthcare providers, including housing navigation and advocacy in collaboration with HSH Coordinated Entry.
- G. Grantee will provide attorney supervision and oversight of all staff, including law clerks.
- H. Grantee will provide support staff/translator capabilities.
- I. 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.sfcddcp.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.

V. Information and Referral

Through Grantee's connections to the community, Grantee will refer potential clients to CAAP, CalFresh, CAPI, Medi-Cal, 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 Bay Legal's San Francisco office (1800 Market Street, 3rd Floor). Grantee staff shall be available for appointments and client engagement interviews.

As appropriate, Grantee will provide services remotely via phone, email, and video conferencing.

VII. Service Objectives

Grantee will meet the following service objective:

- A. Provide HDAP services to up to 270 unduplicated individuals over the contract term. Total caseload capacity at any given time is 225 cases.

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. 20% of HDAP cases are projected to resolve and close over the next year.
- B. 85% of closed cases will have a favorable outcome (approval of SSI application, increase in benefits, preservation of due process rights, exiting homelessness.) 70% of closed cases will result in an approval for or increase in SSI/SSDI or CAPI benefits.
- C. In order to assess client satisfaction and to identify areas for project improvement, Grantee will send an evaluation to all participants to solicit feedback on the services provided upon closure of their case. 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, effectiveness of services, and overall satisfaction with services at least 3 or above on a five-point scale.

IX. Reporting Requirements

- A. MDT Reports – Grantee will update the MDT Tracker for each site, including guests enrolled and guests who received a consultation but were not enrolled.
- B. Quarterly Reports – Grantee will provide data to SFHSA on a quarterly basis 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, reason for denial, date closed, closed reason, housing status at closure, and any other data required by CDSS.
- C. Quarterly Reports – Grantee will summarize the contract activities, referencing the tasks as described in Section VIII & IX – Service and Outcome Objectives. Grantee will provide a breakdown of the case phase status (initial, reconciliation, Administrative Law Judge, Appeals Council, Federal District Court) for all open cases.
- D. 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.

- E. Grantee will enter the mid-year SOGI aggregate data by January 15th, and annual SOGI aggregate data in the CARBON database by the 15th of the month following the end of the program year.
- 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, and participate in evaluation activities.
- H. For assistance with reporting requirements or submission of reports, contact:

Leslie.Lau@sfgov.org
Senior Contract Manager, Office of Contract Management
or
Cindy.Ward@sfgov.org
Program Manager, Homeless Benefits Linkages

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	D	E
1	Appendix B, Page 1			
2				
3	HUMAN SERVICES AGENCY BUDGET SUMMARY			
4	BY PROGRAM			
5	Name		Term	
6	BAY AREA LEGAL AID		7/1/2023-6/30/2025	
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: HDAP SSI Advocacy			
10	Budget Reference Page No.(s)			
11	Program Term	7/1/23-6/30/24	7/1/24-6/30/25	Total
12	Expenditures			
13	Salaries & Benefits	\$1,306,453	\$1,306,453	\$2,612,906
14	Operating Expense	\$233,006	\$233,006	\$466,012
15	Subtotal	\$1,539,459	\$1,539,459	\$3,078,918
16	Indirect Percentage (%)	19%	19%	19%
17	Indirect Cost (Line 16 X Line 15)	\$352,228	\$352,228	\$704,456
18	Capital Expenditure	\$0	\$0	\$0
19	Total Expenditures	\$1,891,687	\$1,891,687	\$3,783,374
20	HSA Revenues			
21	State - CDSS	\$1,891,687	\$1,891,687	\$3,783,374
22				
23				
24				
25				
26				
27				
28				
29	TOTAL HSA REVENUES	\$1,891,687	\$1,891,687	\$3,783,374
30	Other Revenues			
31				
32				
33				
34				
35				
36	Total Revenues	\$1,891,687	\$1,891,687	\$3,783,374
37	Full Time Equivalent (FTE)			
39	Prepared by: Michelle Weger		Date 6/1/2023	
40	HSA-CO Review Signature: _____			
41	HSA #1			10/25/2016

	A	B	C	D	E	F	H	I
1	Appendix B, Page 2							
2								
3								
4	Program Name: HDAP SSI Advocacy							
5	(Same as Line 9 on HSA #1)							
6								
7	Salaries & Benefits Detail							
8								
9								
10								
11		Agency Totals		HSA Program		7/1/23-6/30/24 DHS Program	7/1/24-6/30/25 DHS Program	TOTAL
12	POSITION TITLE	Annual Full TimeSalary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	7/1/23-6/30/25
13	Managing Attorney	\$135,916	1.00	32.5%	0.325	\$44,173	\$44,173	\$88,346
14	Supervising Attorney (MW)	\$121,828	1.00	100%	1.00	\$121,828	\$121,828	\$243,656
15	Supervising Attorney (RSS)	\$121,828	1.00	100%	1.00	\$121,828	\$121,828	\$243,656
16	Staff Attorney (TM)	\$92,228	1.00	100%	1.00	\$92,228	\$92,228	\$184,456
17	Staff Attorney (JC)	\$96,943	1.00	75%	0.75	\$72,707	\$96,943	\$169,650
18	Staff Attorney (AP)	\$98,218	1.00	25%	0.25	\$24,236	\$0	\$24,236
19	Staff Attorney (NMV)	\$93,881	1.00	100%	1.00	\$93,881	\$93,881	\$187,762
20	Staff Attorney (EB)	\$98,852	1.00	100%	1.00	\$98,852	\$98,852	\$197,704
21	Staff Attorney (TBH)	\$95,531	1.00	100%	1.00	\$95,531	\$95,531	\$191,062
22	Social Worker (CB)	\$113,293	1.00	100%	1.00	\$113,293	\$113,293	\$226,586
23	Social Worker (VR)	\$95,531	1.00	100%	1.00	\$95,531	\$95,531	\$191,062
24	Advocate (CT)	\$104,342	1.00	25%	0.25	\$26,086	\$26,086	\$52,172
25	Support Staff (AC)	\$84,233	1.00	55%	0.55	\$46,328	\$46,328	\$92,656
26					-			\$0
27					-			\$0
28					-			\$0
29					-			\$0
30					-			\$0
31					-			\$0
32	TOTALS		13.00		10.13	\$1,046,502	\$1,046,502	\$2,093,004
33								
34	FRINGE BENEFIT RATE	24.84% *FTEs reflect FY2324 only						
35	EMPLOYEE FRINGE BENEFITS					\$259,951	\$259,951	\$519,902
36								
37								
38	TOTAL SALARIES & BENEFITS	\$0				\$1,306,453	\$1,306,453	\$2,612,906
39	HSA #2	10/25/2016						

	A	B	C	D	E	F	H	I	J
1	Appendix B, Page 3								
2									
3									
4	Program Name: HDAP SSI /								
5	(Same as Line 9 on HSA #1)								
6									
7	Operating Expense Detail								
8									
9									
10									
11	TOTAL								
12	<u>Expenditure Category</u>		TERM	<u>7/1/23-6/30/24</u>	<u>7/1/24-6/30/25</u>				
13	Rental of Property			\$157,965	\$157,547				\$ 315,512.00
14	Utilities(Elec, Water, Gas, Phone, Garbage)			\$37,026	\$36,858				\$ 73,884.00
15	Office Supplies, Postage			\$8,094	\$8,301				\$ 16,395.00
16	Building Maintenance Supplies and Repair								\$ -
17	Printing and Reproduction			\$725	\$743				\$ 1,468.00
18	Insurance			\$8,155	\$8,362				\$ 16,517.00
19	Staff Training								\$ -
20	Staff Travel-(Local & Out of Town)			\$5,000	\$5,000				\$ 10,000.00
21	Rental of Equipment			\$6,041	\$6,195				\$ 12,236.00
22	CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE								
23									
24									\$ -
25									\$ -
26									\$ -
27									\$ -
28	OTHER								
29	Litigation			\$10,000	\$10,000				\$ 20,000.00
30									\$ -
31									\$ -
32									\$ -
33									\$ -
34									
35	TOTAL OPERATING EXPENSE			\$233,006	\$233,006				\$466,012
36									
37	HSA #3								10/25/2016

	A	B	C	E	F	
1	Appendix B, Page 4					
2						
3						
4	Program Name: HDAP SSI Advocacy					
5	(Same as Line 9 on HSA #1)					
6						
7	Program Expenditure Detail					
8						
9						
10	EQUIPMENT		TERM	7/1/23-6/30/24	7/1/24-6/30/25	TOTAL
11	No.	ITEM/DESCRIPTION				
12						0
13						0
14						0
15						0
16						0
17						0
18						0
19						0
20	TOTAL EQUIPMENT COST			0	0	0
21						
22	R E M O D E L I N G					
23	Description:					0
24						0
25						0
26						0
27						0
28						0
29	TOTAL REMODELING COST			0	0	0
30						
31	TOTAL CAPITAL EXPENDITURE			0	0	0
32	(Equipment and Remodeling Cost)					
33	HSA #4					10/25/2016