



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



**London Breed**  
Mayor

**Trent Rhorer**  
Executive Director

**MEMORANDUM**

**TO:** HUMAN SERVICES COMMISSION

**THROUGH:** TRENT RHORER, EXECUTIVE DIRECTOR

**FROM:** ANNA PINEDA, DEPUTY DIRECTOR, ECONOMIC SUPPORT & SELF SUFFICIENCY  
ESPERANZA ZAPIEN, DIRECTOR OF CONTRACTS

**DATE:** JANUARY 21, 2022

**SUBJECT:** GRANT MODIFICATION: **BAY AREA LEGAL AID (NON-PROFIT)** FOR PROVISION OF HOUSING DISABILITY & ADVOCACY PROGRAM (HDAP) SERVICES

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	<u>Current</u>	<u>Modification</u>	<u>Revised</u>	<u>Contingency</u>	<u>Total</u>
<b>GRANT TERM:</b>	7/1/21- 6/30/23	2/1/22- 6/30/23	7/1/21- 6/30/23		
<b>GRANT AMOUNT:</b>	\$968,846	\$985,911	\$1,954,757	\$195,476	\$2,150,233
<b>ANNUAL AMOUNT:</b>	<u>FY 21/22</u>	<u>FY 22/23</u>			
	\$770,156	\$1,184,601			
<b>Funding Source MODIFICATION FUNDING:</b>	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
<b>PERCENTAGE:</b>	\$271,500	\$1,683,257		\$195,476	\$2,150,233
	14%	86%			100%

The Department of Benefits and Family Support requests authorization to modify the existing grant with Bay Area Legal Aid for provision of HDAP & Tipping Point Community (TPC) SSI Pilot Services for the period of February 1, 2022 through June 30, 2023, for an increased amount of \$985,911 plus a 10% contingency for a revised total amount not to exceed \$2,150,233. The purpose of this modification is to expand HDAP services. The TPC SSI Pilot services are not being modified at this time.

Program Name	7/1/2021 to 6/30/2022			7/1/2022 to 6/30/2023			Total
	Original	Modification	Revised	Original	Modification	Revised	
<b>HDAP</b>	\$348,673	\$149,983	\$498,656	\$348,673	\$835,928	\$1,184,601	\$1,683,257
<b>TPC SSI Pilot</b>	\$271,500	\$0	\$271,500	\$0	\$0	\$0	\$271,500
<b>Grant Amount:</b>	<b>\$620,173</b>	<b>\$149,983</b>	<b>\$770,156</b>	<b>\$348,673</b>	<b>\$835,928</b>	<b>\$1,184,601</b>	<b>\$1,954,757</b>
<b>Contingency 10%</b>							\$195,476
<b>TOTAL NTE:</b>							<b>\$2,150,233</b>

### Background

Many people experiencing homelessness 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, as well as providing other social service supports, with the ultimate goal of obtaining an SSI/SSDI approval. The State has significantly increased funding for the Housing Disability and Advocacy Program (HDAP), leading to an opportunity to expand services to additional clients.

### Services to be Provided

Grantee will provide SSI Advocacy including legal services and social worker services in order to help individuals participating in the state-funded HDAP 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. 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. Grantee will provide HDAP services to 172 individuals through June 30, 2023.

### Grantee Selection

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

### Funding

This modification of the HDAP program will be funded entirely through State grant funds from the California Department of Social Services. The TPC SSI Pilot program is funded by county General Funds.

**ATTACHMENTS**

Appendix A-1: HDAP & TPC SSI Pilot Advocacy Scope

Appendix B-1: HDAP Budget

**Appendix A-1**  
**Services to be Provided**  
**Bay Area Legal Aid**  
**Tipping Point Community (TPC) SSI Pilot**  
**Housing and Disability Advocacy Program (HDAP)**  
**July 1, 2021 to June 30, 2023**  
*Revised January 1, 2022*

**I. Purpose of Grant**

The SSI legal and advocacy services provided by these programs 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 TPC SSI Pilot and the HDAP 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 TPC SSI Pilot services and HDAP will be provided for the full 2-year term.

**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
ES	HSA Employment Specialist
Grantee	Bay Area Legal Aid
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

### III. Target Population

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

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.
- E. Provide case management services, including housing navigation services, assistance applying for public benefits, assistance connecting to health care, and referral for other civil legal and social 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.sfc-dcp.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 only:**

- A. 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).
- B. In addition to representing clients at all stages of the administrative and appeals process, legal services may be provided to assist clients with reinstatements, recertifications, and advocating with SSA on clients' behalf.
- C. Outreach to clients and coordinate services with case management, housing, and healthcare providers, including housing navigation and advocacy in collaboration with HSH Coordinated Entry.

**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, 3<sup>rd</sup> 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**

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

- A. Provide TPC SSI Pilot services to up to 70 individuals in FY21/22, and 25 individuals in FY22/23.
- B. Provide HDAP services to up to 172 individuals through June 30, 2023.

**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 TPC SSI Pilot cases are projected to resolve and close, 85% of which will have a favorable outcome (approval of SSI application). For FY 22/23, 50% of the TPC SSI Pilot cases are projected to resolve.
- 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. Quarterly Reports – **HDAP**. 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. Grantee is responsible for presenting cases that are accurate in content.
- B. Quarterly Reports – **TPC SSI Pilot**. Grantee will provide quarterly data and narrative 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  
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.



**HUMAN SERVICES AGENCY BUDGET SUMMARY  
BY PROGRAM**

	A	B	C	D	E	F	G	H
1								
2								
3								
4								
5	Name					Term		
6	Bay Area Legal Aid					7/1/2021 to 6/30/2023		
7	(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input checked="" type="checkbox"/>							
8	If modification, Effective Date of Mod. 1/1/22 No. of Mod. 1							
9	Program: HDAP							
10	Budget Reference Page No.(s)	7/1/2021 to 6/30/2022			7/1/2022 to 6/30/2023			
11	Program Term	Original	Modification	Revised	Original	Modification	Revised	Total
12	<b>Expenditures</b>							
13	Salaries & Benefits	\$260,779	\$112,550	\$373,329	\$260,779	\$643,969	\$904,748	\$1,278,077
14	Operating Expense	\$39,562	\$11,953	\$51,515	\$39,977	\$72,298	\$112,275	\$163,790
15	<b>Subtotal</b>	\$300,341	\$124,503	\$424,844	\$300,756	\$716,267	\$1,017,023	\$1,441,867
16	Indirect Percentage (%)	14%	14%	14%	14%	14%	14%	14%
17	Indirect Cost	\$47,917	\$20,680	\$68,597	\$47,917	\$119,661	\$167,578	\$236,175
18	Capital	\$415	\$4,800	\$5,215	\$0	\$0	\$0	\$5,215
19	Pass-through to Providers							
20	<b>Total Expenditures</b>	<b>\$348,673</b>	<b>\$149,983</b>	<b>\$498,656</b>	<b>\$348,673</b>	<b>\$835,928</b>	<b>\$1,184,601</b>	<b>\$1,683,257</b>
21	<b>HSA Revenues</b>							
22	State Funds	\$348,673	\$149,983	\$498,656	\$348,673	\$835,928	\$1,184,601	\$1,683,257
23								
24								
25								
26								
27								
28								
29								
30	<b>TOTAL HSA REVENUES</b>	<b>\$348,673</b>	<b>\$149,983</b>	<b>\$498,656</b>	<b>\$348,673</b>	<b>\$835,928</b>	<b>\$1,184,601</b>	<b>\$1,683,257</b>
31	<b>Other Revenues</b>							
32								
33								
34								
35								
36								
37	Total Revenues	\$0						\$0
38	Full Time Equivalent (FTE)	3.15			3.15	3.15		
40	Prepared by: Michelle Weger		Telephone No.: 510-250-5243			Date 1/12/22		
41	HSA-CO Review Signature: _____							
42	<b>HSA #1</b>							<b>10/25/2016</b>

	A	B	C	D	E	F	G	H	I	J	K	L	
4	Program Name: Social Services 17-20											Appendix B-1, Page 2	
5	(Same as Line 9 on HSA #1)												
6													
7	<b>Salaries &amp; Benefits Detail</b>												
8													
9													
10													
11		Agency Totals		HSA Program		HDAP: 7/1/2021 - 6/30/2022			HDAP: 7/1/2022 - 6/30/2023			TOTAL	
12	POSITION TITLE	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Modification	Revised	Budgeted Salary	Modification	Revised	7/01/21 to 6/30/23	
13	Managing Attorney - SSI	\$131,957	100%	4.886%	4.886%	\$6,192	\$255	\$6,447	\$6,192	\$406	\$6,598	\$13,045	
14	Supervising Attorney - SSI	\$109,220	100%	19.282%	19.282%	\$20,050	\$1,010	\$21,060	\$20,050	\$67,326	\$87,376	\$108,436	
15	Staff Attorney (Wolchansky)	\$104,735	100%	35.786%	35.786%	\$35,600	\$1,880	\$37,480	\$35,600	\$42,951	\$78,551	\$116,031	
16	Staff Attorney (Castro)	\$88,667	100%	59.075%	59.075%	\$49,250	\$3,130	\$52,380	\$49,250	\$24,344	\$73,594	\$125,974	
17	Staff Attorney (Pappas)	\$87,224	100%	47.240%	47.240%	\$38,700	\$2,505	\$41,205	\$38,700	\$4,912	\$43,612	\$84,817	
18	New Staff Attorney 1 - start 4/1/22	\$88,667	100%	25.000%	25.000%	\$0	\$22,167	\$22,167	\$0	\$88,667	\$88,667	\$110,834	
19	New Staff Attorney 2 - start 4/1/22	\$87,224	100%	25.000%	25.000%	\$0	\$21,806	\$21,806	\$0	\$87,224	\$87,224	\$109,030	
20	Social Worker (Banks)	\$104,423	100%	28.634%	28.634%	\$28,400	\$1,500	\$29,900	\$28,400	\$65,581	\$93,981	\$123,881	
21	New Social Worker - start 4/1/22	\$95,043	100%	25.000%	25.000%	\$0	\$23,761	\$23,761	\$0	\$95,043	\$95,043	\$118,804	
22	Advocate (Tien)	\$95,433	100%	18.966%	18.966%	\$17,100	\$1,000	\$18,100	\$17,100	\$1,987	\$19,087	\$37,187	
23	Support Staff (Li)	\$90,539	100%	14.662%	14.662%	\$12,500	\$775	\$13,275	\$12,500	\$1,081	\$13,581	\$26,856	
24	New Support Staff - start 4/1/22	\$87,536	100%	11.300%	11.300%	\$0	\$9,892	\$9,892	\$0	\$39,391	\$39,391	\$49,283	
25					-								
26					-								
27					-								
28					-								
29					-								
30					-								
31					-								
32					-								
33	TOTALS		12.00	3.148	3.148	\$207,792	\$89,681	\$297,473	\$207,792	\$518,913	\$726,705	\$1,024,178	
34		<i>FTEs for FY2122</i>											
35	FRINGE BENEFIT RATE	24.50%	<i>FY2122 benefits calculated @ 25.5%; FY2223 @ 24.5%</i>										
36	EMPLOYEE FRINGE BENEFITS					\$52,987	\$22,869	\$75,856	\$52,987	\$125,056	\$178,043	\$253,899	
37													
38													
39	TOTAL SALARIES & BENEFITS	\$0				\$260,779	\$112,550	\$373,329	\$260,779	\$643,969	\$904,748	\$1,278,077	
40	HSA #2												10/25/2016

	A	B	C	D	E	F	G	H	I	J	K	L	M
1													
2													
3													
4	Program Name: Social Services 1;												
5	(Same as Line 9 on HSA #1)												
6													
7	<b>Operating Expense Detail</b>												
8													
9													
10													
11				TERM	7/1/21-6/30/22			7/1/22-6/30/23			TOTAL		
12													
13	<u>Expenditure Category</u>				Original	Modification	Revised	Original	Modification	Revised	7/1/21-6/30/23		
14	Rental of Property				\$24,034	\$8,607	\$32,641	\$24,034	\$47,365	\$71,399	\$104,040		
15	Utilities (Elec, Water, Gas, Phone, Scavenger)				\$4,355	\$1,560	\$5,915	\$4,355	\$12,775	\$17,130	\$23,045		
16	Office Supplies, Postage				\$1,791	\$641	\$2,432	\$1,791	\$4,466	\$6,257	\$8,689		
17	Building Maintenance Supplies and Repair												
18	Printing and Reproduction												
19	Insurance				\$1,315	\$471	\$1,786	\$1,315	\$3,341	\$4,656	\$6,442		
20	Rental of Equipment				\$1,882	\$674	\$2,556	\$1,882	\$4,351	\$6,233	\$8,789		
21	Litigation costs (client psychological evaluations)				\$5,785	\$0	\$5,785	\$6,000	\$0	\$6,000	\$11,785		
22	Local travel - staff/clients				\$400	\$0	\$400	\$600	\$0	\$600	\$1,000		
23													
24													
25													
26													
27													
28													
29	<b>TOTAL OPERATING EXPENSE</b>				<b>\$39,562</b>	<b>\$11,953</b>	<b>\$51,515</b>	<b>\$39,977</b>	<b>\$72,298</b>	<b>\$112,275</b>	<b>\$163,790</b>		
30													
31	<b>HSA #3</b>										<b>10/25/2016</b>		

Program Name: Individualized Legal Support Services  
 (Same as Line 9 on HSA #1)

**Capital Expenditure Detail  
 (Equipment and Remodeling Cost)**

7/1/21-6/30/22

**EQUIPMENT**

		Original	Modification	Revised	Original
No.	ITEM/DESCRIPTION				
1	Docking station & external monitor	415	0	415	0
3	laptops & peripherals	0	4,800	4,800	0
<b>TOTAL EQUIPMENT COST</b>		415	4,800	5,215	0

**REMODELING**

Description:				
<b>TOTAL REMODELING COST</b>				

**TOTAL CAPITAL EXPENDITURE**                      \$        415    \$        4,800    \$        5,215    \$        -  
 (Equipment and Remodeling Cost)

**HSA #4**

**7/1/22-6/30/23** **TOTAL**

Modification	Revised	
0	0	415
0	0	4,800
0	0	5,215


**\$ - \$ - \$ 5,215**

**11/15/2007**