



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



**London Breed**  
Mayor

**Trent Rhorer**  
Executive Director

**TO:** DISABILITY AND AGING SERVICES COMMISSION

**THROUGH:** KELLY DEARMAN, EXECUTIVE DIRECTOR

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

DS  
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**DATE:** JULY 7, 2021

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

**GRANT TERMS:** See Table Next Page

**GRANT AMOUNTS:** See Table Next Page

**ANNUAL AMOUNTS:** See Table Next Page

<b>FUNDING SOURCE:</b>	County	State	Federal	Contingency	Total
<b>MODIFICATION FUNDING:</b>	\$3,000,000			\$300,000	\$3,300,000
<b>PERCENTAGE:</b>	100%				100%

The Department of Disability and Aging Services (DAS) requests authorization to modify the existing grant agreements with multiple providers for the period from July 1, 2021 through June 30, 2024, in an amount of \$3,000,000 plus a 10% contingency for a total amount not to exceed \$15,235,000. The purpose of this modification 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.

<u>Agency</u>	<u>Current</u> <u>1/1/21-</u> <u>6/30/24</u>	<u>Modification</u> <u>7/1/21-</u> <u>6/30/22</u>	<u>Modification</u> <u>7/1/22-</u> <u>6/30/23</u>	<u>Modification</u> <u>7/1/23-</u> <u>6/30/24</u>	<u>Revised</u> <u>Total</u> <u>1/1/21-</u> <u>6/30/24</u>	<u>10%</u> <u>Contingency</u>	<u>Not to</u> <u>Exceed</u>
<b>Catholic Charities</b>	\$2,300,000	\$400,000	\$300,000	\$250,000	\$3,250,000	\$325,000	\$3,575,000
<b>Q Foundation</b>	\$6,250,000	\$200,000	\$400,000	\$500,000	\$7,350,000	\$735,000	\$8,085,000
<b>Self-Help for the Elderly</b>	\$2,300,000	\$400,000	\$300,000	\$250,000	\$3,250,000	\$325,000	\$3,575,000
<b>Total</b>	<b>\$10,850,000</b>	<b>\$1,000,000</b>	<b>\$1,000,000</b>	<b>\$1,000,000</b>	<b>\$13,850,000</b>	<b>\$1,385,000</b>	<b>\$15,235,000</b>

### **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. The current range of subsidy being paid for ranges from \$200 to \$1,200 per month.

### **Services to be provided**

The purpose of the grant modification is to provide additional funding that will enable contractors to continue offering the Housing Subsidy for Older Adults and Adults with Disabilities. The increase in funding will allow housing subsidies to be provided to an additional 130 unduplicated

consumers. 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 on August 24, 2020.

**Funding**

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

**ATTACHMENTS**

Appendix A1 – Services to be Provided – Catholic Charities

Appendix B1 – Program Budget – Catholic Charities

Appendix A1 – Services to be Provided – Q Foundation

Appendix B1 – Program Budget – Q Foundation

Appendix A1 – Services to be Provided – Self-Help for the Elderly

Appendix B 1– Program Budget – Self-Help for the Elderly

**APPENDIX A.1 – SERVICES TO BE PROVIDED BY GRANTEE**  
**CATHOLIC CHARITIES**  
**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:

- A. A resident of San Francisco
- B. Aged 60 and above, or
- C. Aged 18 to 59 with a disability
- D. At an income level of 50% ofAMI or below
- E. Lacking stable housing or at risk for homelessness
- F. Not currently receiving duplicative housing subsidy services
- G. Has a need for housing subsidy and is willing to participate in the program

**V. Location and Time of Services**

Services are delivered at Catholic Charities’ offices at 1555 39<sup>th</sup> 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.

**A. Program Infrastructure:**

- Ability to provide administrative assistance, data entry, database maintenance, processing of invoices, and to make payments to landlords.
- 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.

**B. 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.

**C. Housing Subsidy Payments:**

- Rental subsidies shall average \$800 per household, per month, across all participants in the program. The subsidy should be set at the lowest possible amount needed to stably maintain the household.
- Eligible payments include: Rental subsidy, move-in costs (verified by lease agreement and associated with a participant moving to a safer or more affordable housing unit, amount not to exceed \$5000, one time only), and back rent (participants who enroll into the program with back rent needs, may have up to 3 months of back rent paid, one time only, amount to be verified by the lease agreement and written communication with the landlord).

- Grantee will determine if the client is best suited for a short (less than a year) or long term (more than a year) duration.
- Rent limits should conform to HUD Fair Market Rents for San Francisco HUD FMR Metro Area.
- 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. Essential medical payments (insurance, prescriptions, medical bills) and payments that are legally obligated (alimony, spousal support, child support) should be excluded from income available for subsidy calculation.
- 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. During periods where the monthly subsidy is above \$800, clients will undergo recertification every 3 months.
- 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.

**D. 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. Clients with short term needs will be recertified more frequently than participants with long term needs.
- The subsidy may be renewed as long as clients are engaged in their identified plan and continue to meet program eligibility requirements.

**E. 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**

A. 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.

B. For the period July 1, 2021, to June 30, 2024, the Grantee will meet the following Service Objectives annually:

- Provide rental subsidy for at least 73 unduplicated consumers.
- Provide 876 months of housing subsidies. A unit of service is one monthly subsidy payment.
- Transition at least 4 unduplicated consumers off of rental subsidy as a result of increased income or access to other housing resource.

## **VIII. Outcome Objectives**

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

A. Housing Retention Outcomes (collected through Grantee database system)

- 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.

B. Client Satisfaction Outcomes (collected through consumer survey administered by Grantee)

- 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.

## **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.
- 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

Hanna Teferi  
DAS, Office of Community Partnership  
P.O. Box 7988  
San Francisco, CA 94120  
Hanna.Teferi@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.

**APPENDIX A.1 – SERVICES TO BE PROVIDED BY GRANTEE****Q FOUNDATION****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	Q Foundation
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:

- A. A resident of San Francisco
- B. Aged 60 and above, or
- C. Aged 18 to 59 with a disability
- D. At an income level of 50% ofAMI or below
- E. Lacking stable housing or at risk for homelessness
- F. Not currently receiving duplicative housing subsidy services
- G. 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.

**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.

**A. Program Infrastructure:**

- Ability to provide administrative assistance, data entry, database maintenance, processing of invoices, and to make payments to landlords.
- 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.

**B. 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.

**C. Housing Subsidy Payments:**

- Rental subsidies shall average \$800 per household, per month, across all participants in the program. The subsidy should be set at the lowest possible amount needed to stably maintain the household.
- Eligible payments include: Rental subsidy, move-in costs (verified by lease agreement and associated with a participant moving to a safer or more affordable housing unit, amount not to exceed \$5000, one time only), and back rent (participants who enroll into the program with back rent needs, may have up to 3 months of back rent paid, one time only, amount to be verified by the lease agreement and written communication with the landlord).

- Grantee will determine if the client is best suited for a short (less than a year) or long term (more than a year) duration.
- Rent limits should conform to HUD Fair Market Rents for San Francisco HUD FMR Metro Area.
- 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. Essential medical payments (insurance, prescriptions, medical bills) and payments that are legally obligated (alimony, spousal support, child support) should be excluded from income available for subsidy calculation.
- 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. During periods where the monthly subsidy is above \$800, clients will undergo recertification every 3 months.
- 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.

**D. 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. Clients with short term needs will be recertified more frequently than participants with long term needs.
- The subsidy may be renewed as long as clients are engaged in their identified plan and continue to meet program eligibility requirements.

**E. 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**

A. 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.

B. For the period July 1, 2021, to June 30, 2024, the Grantee will meet the following Service Objectives annually:

- Provide rental subsidy for at least 226 unduplicated consumers.
- Provide 2592 months of housing subsidies. A unit of service is one monthly subsidy payment.
- Transition at least 10 unduplicated consumers off of rental subsidy as a result of increased income or access to other housing resource.

## **VIII. Outcome Objectives**

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

A. Housing Retention Outcomes (collected through Grantee database system)

- 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.

B. Client Satisfaction Outcomes (collected through consumer survey administered by Grantee)

- 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.

## **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.
- 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

Fanny Lapitan  
DAS, Office of Community Partnership  
P.O. Box 7988  
San Francisco, CA 94120  
Fanny.Lapitan@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.

**APPENDIX A.1 – SERVICES TO BE PROVIDED BY GRANTEE**  
**SELF HELP FOR THE ELDERLY**  
**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/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:

- A. A resident of San Francisco
- B. Aged 60 and above, or
- C. Aged 18 to 59 with a disability
- D. At an income level of 50% ofAMI or below
- E. Lacking stable housing or at risk for homelessness
- F. Not currently receiving duplicative housing subsidy services
- G. 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.

**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.

**A. Program Infrastructure:**

- Ability to provide administrative assistance, data entry, database maintenance, processing of invoices, and to make payments to landlords.
- 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.

**B. 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.

**C. Housing Subsidy Payments:**

- Rental subsidies shall average \$800 per household, per month, across all participants in the program. The subsidy should be set at the lowest possible amount needed to stably maintain the household.
- Eligible payments include: Rental subsidy, move-in costs (verified by lease agreement and associated with a participant moving to a safer or more affordable housing unit, amount not to exceed \$5000, one time only), and back rent (participants who enroll into the program with back rent needs, may have up to 3 months of back rent paid, one time only, amount to be verified by the lease agreement and written communication with the landlord).

- Grantee will determine if the client is best suited for a short (less than a year) or long term (more than a year) duration.
- Rent limits should conform to HUD Fair Market Rents for San Francisco HUD FMR Metro Area.
- 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. Essential medical payments (insurance, prescriptions, medical bills) and payments that are legally obligated (alimony, spousal support, child support) should be excluded from income available for subsidy calculation.
- 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. During periods where the monthly subsidy is above \$800, clients will undergo recertification every 3 months.
- 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.

**D. 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. Clients with short term needs will be recertified more frequently than participants with long term needs.
- The subsidy may be renewed as long as clients are engaged in their identified plan and continue to meet program eligibility requirements.

**E. 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**

A. 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.

B. For the period July 1, 2021, to June 30, 2024, the Grantee will meet the following Service Objectives annually:

- Provide rental subsidy for at least 100 unduplicated consumers.
- Provide 1000 months of housing subsidies. A unit of service is one monthly subsidy payment.
- Transition at least 15 unduplicated consumers off of rental subsidy as a result of increased income or access to other housing resource.

## **VIII. Outcome Objectives**

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

A. Housing Retention Outcomes (collected through Grantee database system)

- 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.

B. Client Satisfaction Outcomes (collected through consumer survey administered by Grantee)

- 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.

## **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.
- 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

Hanna Teferi  
DAS, Office of Community Partnership  
P.O. Box 7988  
San Francisco, CA 94120  
Hanna.Teferi@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	F	I	J	K	L	M	N	O	P	Q	R
1												Appendix B1, Page 1
2												
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>											
4												
5	Name											
6	<b>Catholic Charities</b>											
7	(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input checked="" type="checkbox"/>											
8	If modification, Effective Date of Mod. 7/21 No. of Mod. 1											
9	<b>Program: Long Term Housing Subsidie</b>											
10	Budget Reference Page No.(s)	Original Budget	Original Budget	Modification	Revised Budget	Original Budget	Modification	Revised Budget	Original Budget	Modification	Revised Budget	Total
11	Program Term	1/1/21-6/30/21	7/1/21-6/30/22	7/1/21-6/30/22	7/1/21-6/30/22	7/1/22-6/30/23	7/1/22-6/30/23	7/1/22-6/30/23	7/1/23-6/30/24	7/1/23-6/30/24	7/1/23-6/30/24	7/1/21-6/30/24
12	<b>Expenditures</b>											
13	Salaries & Benefits	\$70,728	\$146,392	\$76,612	\$223,004	\$134,083	\$94,320	\$223,003	\$134,083	\$94,320	\$223,003	\$739,738
14	Operating Expenses	\$4,055	\$5,743	\$6,171	\$11,914	\$13,958	(\$5,531)	\$8,428	\$13,958	(\$5,185)	\$8,773	\$33,170
15	<b>Subtotal</b>	<b>\$74,783</b>	<b>\$152,135</b>	<b>\$82,783</b>	<b>\$234,918</b>	<b>\$148,041</b>	<b>\$88,789</b>	<b>\$231,431</b>	<b>\$148,041</b>	<b>\$89,135</b>	<b>\$231,776</b>	<b>\$772,908</b>
16	Indirect Percentage (%)	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$11,217	\$22,820	\$12,417	\$35,237	\$22,207	\$13,318	\$34,715	\$22,207	\$13,370	\$34,767.47	\$115,936
18	SubContractor/Capital Expenditures	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0.00	\$0	\$0	\$0
19	Housing Subsidies	\$164,000	\$425,045	\$304,800	\$729,845	\$529,752	\$197,893	\$733,854	\$579,751	\$147,495	\$733,457	\$2,361,156
20	<b>Total Expenditures</b>	<b>\$250,000</b>	<b>\$600,000</b>	<b>\$400,000</b>	<b>\$1,000,000</b>	<b>\$700,000</b>	<b>\$300,000</b>	<b>\$1,000,000</b>	<b>\$750,000</b>	<b>\$250,000</b>	<b>\$1,000,000</b>	<b>\$3,250,000</b>
21	<b>HSA Revenues</b>											
22	General Fund	\$250,000	\$600,000	\$400,000	\$1,000,000	\$700,000	\$300,000	\$1,000,000	\$750,000	\$250,000	\$1,000,000	\$3,250,000
23												\$0
24												
25												
26												
27												
28												
29												
30	<b>TOTAL HSA REVENUES</b>	<b>\$250,000</b>	<b>\$600,000</b>	<b>\$400,000</b>	<b>\$1,000,000</b>	<b>\$700,000</b>	<b>\$300,000</b>	<b>\$1,000,000</b>	<b>\$750,000</b>	<b>\$250,000</b>	<b>\$1,000,000</b>	<b>\$3,250,000</b>
31	<b>Other Revenues</b>											
32												
33												
34												
35												
36												
37	<b>Total Revenues</b>	<b>\$250,000</b>	<b>\$600,000</b>	<b>\$400,000</b>	<b>\$1,000,000</b>	<b>\$700,000</b>	<b>\$300,000</b>	<b>\$1,000,000</b>	<b>\$750,000</b>	<b>\$250,000</b>	<b>\$1,000,000</b>	<b>\$3,250,000</b>
38	Full Time Equivalent (FTE)		1.73	1.04	2.77	1.65	1.04	2.77	1.65	1.04	2.77	
40	Prepared by: Patty Clement/Delilah Perez											
41	HSA-CO Review Signature: _____											
42	<b>HSA #1</b>											<b>6/20/2018</b>



	A	B	C	D	M	N	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH	AI	AJ	AK
1																									
2																									
3	Catholic Charities																								
4	Program: Long Term Housing Subsidies																								
5																									
6																									
7	<b>Operating Expense Detail</b>																								
8																									
9																									
10																									
11																									
12	Expenditure Category	TERM	1/1/21-6/30/21	7/1/21-6/30/22	7/1/21-6/30/22	7/1/21-6/30/22	7/1/21-6/30/22	7/1/21-6/30/22	7/1/23-6/30/24	7/1/23-6/30/24	7/1/23-6/30/24	7/1/23-6/30/24	7/1/21-6/30/24	7/1/21-6/30/24	7/1/21-6/30/24	7/1/21-6/30/24	7/1/21-6/30/24	7/1/21-6/30/24	7/1/21-6/30/24	7/1/21-6/30/24	7/1/21-6/30/24	7/1/21-6/30/24	7/1/21-6/30/24	7/1/21-6/30/24	TOTAL
13	Rental of Property		\$1,360	\$1,313	\$1,986	\$3,299	\$4,813	(\$2,431)	\$2,383	\$4,813	(\$2,231)	\$2,582	\$9,624												
14	Utilities(Elec, Water, Gas, Phone, Garbage)		\$100	\$1,450	\$700	\$2,150	\$2,855	(\$1,200)	\$1,655	\$2,855	(\$1,054)	\$1,801	\$5,706												
15	Office Supplies, Postage		\$175	\$290	\$100	\$390	\$350	\$350	\$350	\$350	\$0	\$350	\$1,265												
16	Building Maintenance Supplies and Repair		\$0	\$150	\$100	\$250	\$150	0	\$150	\$150	\$0	\$150	\$550												
17	Printing and Reproduction		\$100	\$150	\$50	\$200	\$150	\$0	\$150	\$150	\$0	\$150	\$600												
18	Insurance		\$1,000	\$1,500	\$1,500	\$1,500	\$1,500	\$0	\$1,500	\$1,500	\$1,500	\$5,500													
19	Staff Training		\$100	\$110	\$110	\$220	\$2,110	(\$1,900)	\$210	\$2,110	(\$1,900)	\$210	\$740												
20	Staff Travel-Local & Out of Town		\$100	\$500	\$1,133	\$1,633	\$1,250	\$0	\$1,250	\$1,250	\$0	\$1,250	\$4,233												
21	Rental of Equipment		\$0	\$100	\$50	\$150	\$100	\$0	\$100	\$100	\$0	\$100	\$350												
22																									
23	<b>CONSULTANTS</b>																								
24																									
25																									
26																									
27	<b>OTHER</b>																								
28	Computer Related		\$150	\$180	\$142	\$322	\$680	\$0	\$680	\$680	\$0	\$680	\$1,832												
29	Start up Computer workstations		\$970	\$0	\$1,800	\$1,800	\$0	\$0	\$0	\$0	\$0	\$0	\$2,770												
30	Housing Subsidies		\$164,000	\$425,045	\$304,800	\$729,845	\$529,752	\$197,893	\$733,854	\$579,751	\$147,495	\$733,457	\$2,361,156												
31																									
32	<b>TOTAL OPERATING EXPENSE</b>		<b>\$ 4,055</b>	<b>\$ 5,743</b>	<b>\$ 6,171</b>	<b>\$ 11,914</b>	<b>\$ 13,958</b>	<b>\$ (5,531)</b>	<b>\$ 8,428</b>	<b>\$ 13,958</b>	<b>\$ (5,185)</b>	<b>\$ 8,773</b>	<b>\$ 33,170</b>												
33																									
34	<b>HSA #3</b>																								

	A	D	E	F	G	H	I	J	K	L	M	N
1												
2												
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>											
4	<b>BY PROGRAM</b>											
5	Name		Term									
6	Agency Name: Q Foundation		1/1/21-6/30/24									
7	(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input checked="" type="checkbox"/>											
8	If modification, Effective Date of Mod. 7/1/2021 No. of Mod. 1											
9	<b>Program: RFP 882 - Long-Term Housing Subsidies</b>											
10	Budget Reference Page No.(s)	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	Program Term	Revised	Budgeted	Modification	Revised	Budgeted	Modification	Revised	Budgeted	Modification	Revised	Total Revised
12	<b>Expenditures</b>											
13	Salaries & Benefits	\$92,067	\$233,771	(\$92,363)	\$141,408	\$233,771	(\$85,293)	\$148,478	\$233,771	(\$84,939)	\$148,832	\$530,785
14	Operating Expenses	\$9,828	\$61,287	(\$27,141)	\$34,146	\$61,287	(\$27,141)	\$34,146	\$61,287	(\$27,141)	\$34,146	\$112,266
15	<b>Subtotal</b>	\$101,895	\$295,058	(\$119,504)	\$175,554	\$295,058	(\$112,434)	\$182,624	\$295,058	(\$112,080)	\$182,978	\$643,051
16	Indirect Percentage (%)		15%			15%			15%			15%
17	Indirect Cost (Line 16 X Line 15)	\$15,284	\$44,258	(\$17,925)	\$26,333	\$44,258	(\$16,865)	\$27,393	\$44,258	(\$16,812)	\$27,446	\$96,456
18	Housing Subsidies	\$932,821	\$1,560,684	\$337,429	\$1,898,113	\$1,360,684	\$529,299	\$1,889,983	\$1,260,684	\$628,892	\$1,889,576	\$6,610,493
19	Subcontractor/Capital Expenditures	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
20	Total Expenditures	\$1,050,000	\$1,900,000	\$200,000	\$2,100,000	\$1,700,000	\$400,000	\$2,100,000	\$1,600,000	\$500,000	\$2,100,000	\$7,350,000
21	<b>HSA Revenues</b>											
22	General Fund	\$1,050,000	\$1,900,000	\$200,000	\$2,100,000	\$1,700,000	\$400,000	\$2,100,000	\$1,600,000	\$500,000	\$2,100,000	\$7,350,000
23												
24												
25												
26												
27												
28												
29												
30	TOTAL HSA REVENUES	\$1,050,000	\$1,900,000	\$200,000	\$2,100,000	\$1,700,000	\$400,000	\$2,100,000	\$1,600,000	\$500,000	\$2,100,000	\$7,350,000
31	<b>Other Revenues</b>											
32												
33												
34												
35												
36												
37	Total Revenues	\$1,050,000	\$1,900,000	\$200,000	\$2,100,000	\$1,700,000	\$400,000	\$2,100,000	\$1,600,000	\$500,000	\$2,100,000	\$7,350,000
38	Full Time Equivalent (FTE)											
40	Prepared by: Thomas Larsen	Telephone No.: 415 552 3242										
41	HSA-CO Review Signature:	_____										
42	HSA #1											



	A	B	C	D	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
1																			
2																			
3	Agency Name: Q Foundation																		
4	Program: RFP 882 - Long-Term Housing Subsidies																		
5																			
6																			
7	<b>Operating Expense Detail</b>																		
8																			
9																			
10																			
11		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			TOTAL 1/1/21-6/30/24					
12	<b>Expenditure Category</b>	Revised	Budgeted	Modified	Revised	Budgeted	Modified	Revised	Budgeted	Modified	Revised	Budgeted	Modified	Revised	Revised				
13	Rental of Property	\$2,884	\$5,387	\$5,387	\$0	\$5,387	\$5,387	\$0	\$5,387	\$5,387	\$0	\$5,387	\$5,387	\$0	\$2,884				
14	Utilities(Elec, Water, Gas, Phone, Garbage)	\$59	\$6,094	\$2,864	\$3,230	\$6,094	\$2,864	\$3,230	\$6,094	\$2,864	\$3,230	\$6,094	\$2,864	\$3,230	\$9,749				
15	Office Supplies, Software subscriptions	\$0	\$1,924	\$1,197	\$727	\$1,924	\$1,197	\$727	\$1,924	\$1,197	\$727	\$1,924	\$1,197	\$727	\$2,181				
16	Insurance	\$0	\$2,159	\$832	\$2,991	\$2,159	\$832	\$2,991	\$2,159	\$832	\$2,991	\$2,159	\$832	\$2,991	\$8,973				
17	Payroll processing & delivery	\$103	\$1,026	\$1,558	\$2,584	\$1,026	\$1,558	\$2,584	\$1,026	\$1,558	\$2,584	\$1,026	\$1,558	\$2,584	\$7,855				
18	Staff Travel-(Local & Out of Town)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0				
19	Outreach	\$0	\$539	\$539	\$0	\$539	\$539	\$0	\$539	\$539	\$0	\$539	\$539	\$0	\$0				
20	Recruitment	\$0	\$6,738	\$6,738	\$0	\$6,738	\$6,738	\$0	\$6,738	\$6,738	\$0	\$6,738	\$6,738	\$0	\$0				
21	Employee/Volunteer Appreciation	\$0	\$405	\$405	\$0	\$405	\$405	\$0	\$405	\$405	\$0	\$405	\$405	\$0	\$0				
22	Rent Subsidy Payment Processing Fees	\$0	\$4,209	\$7,216	\$11,425	\$4,209	\$7,216	\$11,425	\$4,209	\$7,216	\$11,425	\$4,209	\$7,216	\$11,425	\$34,275				
23																			
24	<b>CONSULTANTS</b>																		
25	Security and Privacy Audit	\$0	\$4,858	\$1,871	\$6,729	\$4,858	\$1,871	\$6,729	\$4,858	\$1,871	\$6,729	\$4,858	\$1,871	\$6,729	\$20,187				
26	IT Support	\$528	\$4,198	\$2,262	\$6,460	\$4,198	\$2,262	\$6,460	\$4,198	\$2,262	\$6,460	\$4,198	\$2,262	\$6,460	\$19,908				
27	Current Member Database	\$6,254	\$18,865	\$18,865	\$0	\$18,865	\$18,865	\$0	\$18,865	\$18,865	\$0	\$18,865	\$18,865	\$0	\$6,254				
28	CPA - Program Admin	\$0	\$4,885	\$4,885	\$0	\$4,885	\$4,885	\$0	\$4,885	\$4,885	\$0	\$4,885	\$4,885	\$0	\$0				
29																			
30																			
31	<b>OTHER</b>																		
32																			
33																			
34																			
35	<b>TOTAL OPERATING EXPENSE</b>	<b>\$9,828</b>	<b>\$61,287</b>	<b>\$27,141</b>	<b>\$34,146</b>	<b>\$61,287</b>	<b>\$27,141</b>	<b>\$34,146</b>	<b>\$61,287</b>	<b>\$27,141</b>	<b>\$34,146</b>	<b>\$61,287</b>	<b>\$27,141</b>	<b>\$34,146</b>	<b>\$112,266</b>				
36																			
37	<b>HSA #3</b>																		

	A	B	C	D	E	F	G	H	I	J	K	L
1												
2												
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>											
4	<b>BY PROGRAM</b>											
5	Name		Term									
6	Agency Name SELF-HELP FOR THE ELDERLY		1/1/21-6/30/24									
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input checked="" type="checkbox"/>											
8	If modification, Effective Date of Mod. 7/1/21 No. of Mod. 1											
9	<b>Program: LONG-TERM HOUSING SUBSIDIES</b>											
10	Budget Reference Page No.(s)		Original Budget	Additional Funding	Revised Budget	Original Budget	Additional Funding	Revised Budget	Original Budget	Additional Funding	Revised Budget	Total
11	Program Term	1/1/21-6/30/21	7/1/21-6/30/22	7/1/21-6/30/22	7/1/21-6/30/22	7/1/22-6/30/23	7/1/22-6/30/23	7/1/22-6/30/23	7/1/23-6/30/24	7/1/23-6/30/24	7/1/23-6/30/24	1/121-6/30/2024
12	<b>Expenditures</b>											
13	Salaries & Benefits	\$87,347	\$174,694	\$104,624	\$279,318	\$188,838	\$90,480	\$279,318	\$188,838	\$90,480	\$279,318	\$925,301
14	Operating Expenses	\$7,900	\$13,400	\$6,750	\$20,150	\$13,400	\$6,750	\$20,150	\$13,400	\$6,750	\$20,150	\$68,350
15	<b>Subtotal</b>	<b>\$95,247</b>	<b>\$188,094</b>	<b>\$111,374</b>	<b>\$299,468</b>	<b>\$202,238</b>	<b>\$97,230</b>	<b>\$299,468</b>	<b>\$202,238</b>	<b>\$97,230</b>	<b>\$299,468</b>	<b>\$993,651</b>
16	Indirect Percentage (%)	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$14,287	\$28,214	\$16,706	\$44,920	\$30,336	\$14,585	\$44,920.70	\$30,336	\$14,585	\$44,921	\$149,049
18	Subcontractor/Capital Expenditures	\$2,400	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$2,400
19	Housing Subsidies	\$138,066	\$383,692	\$271,920	\$655,612	\$467,426	\$188,185	\$655,611	\$517,426	\$138,185	\$655,611	\$2,104,900
20	Total Expenditures	\$250,000	\$600,000	\$400,000	\$1,000,000	\$700,000	\$300,000	\$1,000,000	\$750,000	\$250,000	\$1,000,000	\$3,250,000
21	<b>HSA Revenues</b>											
22	General Fund	\$250,000	\$600,000	\$400,000	\$1,000,000	\$700,000	\$300,000	\$1,000,000	\$750,000	\$250,000	\$1,000,000	\$3,250,000
23												
24												
25												
26												
27												
28												
29												
30	TOTAL HSA REVENUES	\$250,000	\$600,000	\$400,000	\$1,000,000	\$700,000	\$300,000	\$1,000,000	\$750,000	\$250,000	\$1,000,000	\$3,250,000
31	<b>Other Revenues</b>											
32												
33												
34												
35												
36												
37	Total Revenues	\$250,000	\$600,000	\$400,000	\$1,000,000	\$700,000	\$300,000	\$1,000,000	\$750,000	\$250,000	\$1,000,000	\$3,250,000
38	Full Time Equivalent (FTE)											
40	Prepared by: Leny Nair	Telephone No.: (415) 677-7682										5/14/2021
41	HSA-CO Review Signature: _____											
42	<b>HSA #1</b>											<b>6/20/2018</b>





	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1																				
2																				
3	Agency Name SELF-HELP FOR THE ELDERLY																			
4	Program: LONG-TERM HOUSING SUBSIDIES																			
5																				
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22																				
23	<b>CONSULTANTS</b>																			
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25																				
26																				
27	<b>OTHER</b>																			
28																				
29																				
30																				
31																				
32																				
33	<b>HSA #3</b>																			

	A	B	C	D	E	F
1						Appendix B1, Page 4
2						
3		<b>Agency Name SELF-HELP FOR THE ELDERLY</b>				
4		<b>Program: LONG-TERM HOUSING SUBSIDIES</b>				
5						
6						
7						
8		<b>Subcontractor/Capital Expenditures</b>				
9						
10		<b>SUBCONTRACTORS</b>	1/1/21-6/30/21	7/1/21-6/30/22	7/1/23-6/30/24	1/1/21-6/30/24
11		Subcontractor 1				
12		Subcontractor 2				
13						
14						
15						
16		<b>TOTAL SUBCONTRACTOR COST</b>	\$0	\$0	\$0	\$0
17						
18						
19		<b>EQUIPMENT</b>	<b>TERM</b>	1/1/21-6/30/21	7/1/21-6/30/22	7/1/23-6/30/24
20	Units	ITEM/DESCRIPTION				
21	2	Desktops & printer	\$2,400			
22						
23						
24						
25		<b>TOTAL EQUIPMENT COST</b>	\$2,400	\$0	\$0	\$2,400
26						
27		<b>R E M O D E L I N G</b>	1/1/21-6/30/21	7/1/21-6/30/22	7/1/23-6/30/24	1/1/21-6/30/24
28		Description:				
29		Remodel A				
30						
31						
32		<b>TOTAL REMODELING COST</b>	\$0	\$0	\$0	\$0
33						
34		<b>TOTAL SUBCONTRACTOR/CAPITAL EXPENDITURE</b>	<b>\$2,400</b>	<b>\$0</b>	<b>\$0</b>	<b>\$2,400</b>
35						
36		<b>HSA #4</b>				6/20/2018