



MEMORANDUM

TO: AGING & ADULT SERVICES COMMISSION

THROUGH: SHIREEN MCSPADDEN, EXECUTIVE DIRECTOR

FROM: CINDY KAUFFMAN, DEPUTY DIRECTOR
JOHN TSUTAKAWA, DIRECTOR OF CONTRACTS

DATE: JUNE 7, 2017

SUBJECT: GRANT RENEWAL: **VARIOUS AGENCIES (NON-PROFIT) FOR THE PROVISION OF THE RESIDENTIAL ASSISTANCE DEMONSTRATION (RAD) PROGRAM**

GRANT TERM:	<u>Current</u>	<u>Renewal</u>	<u>Contingency</u>	<u>Total</u>	
	11/1/15- 6/30/17	7/1/17- 6/30/19			
GRANT AMOUNT:	\$2,098,095	\$3,238,348	\$323,831	\$3,562,179	
FUNDING SOURCE	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
FUNDING:	\$3,238,348	\$0	\$0	\$323,831	\$3,562,179
PERCENTAGE:	100%				100%

The Department of Aging & Adult Services (DAAS) requests authorization to renew grants with the proposed grantees listed below for the period of July 1, 2017 to June 30, 2019 in an amount of \$3,328,348 plus a 10% contingency for a total amount not to exceed \$3,562,179 (please see attached table). The purpose of the grants is to provide service connection to seniors residing in San Francisco Assistance Demonstration (RAD) converted Housing Development units.

Background

San Francisco Housing Authority (SFHA) has faced significant financial challenges in recent years due to the reduction of federal funding for public housing. Although some public housing properties are well maintained and in good condition, a large number suffer from deferred maintenance and all require extensive capital improvements, as evidenced by high vacancy rates, lengthy and expensive unit turnover, and outstanding maintenance requests.

In response to the SFHA's challenges, City and SFHA staff and 72 different organizations met over a 4 month period in early 2013 to re-envision the work of the SFHA. As part of the implementation of those recommendations, SFHA and City staff, including the Mayor's Office, the Mayor's Office of Housing and Community Development, and the City Administrator, developed a financing strategy to address the long term viability of the SFHA portfolio. The proposed financing addressed the critical immediate and long term rehabilitation needs by attracting new capital such as low income housing tax credit equity to replace reduced and inadequate federal funding. The plan also included the use of US Department of Housing and Urban Development (HUD) Project-Based Vouchers under the federal Rental Assistance Demonstration Program (RAD), and additional vouchers which are being requested under HUD's Section 18 Disposition program. These vouchers will preserve the existing affordability of the newly rehabilitated housing.

One of the key elements of the plan is the conversion of federal public housing operating and capital subsidy streams into long-term project-based Section 8 vouchers (PBVs) under the RAD program, to secure the leveraging of private resources.

The SFHA has divided twenty (20) of its public housing sites grouped into eight (8) neighborhood Clusters in San Francisco. Sites range in size from 24 units to 234 units, while the Clusters themselves range in size from 273 units to 577 units. The Clusters have been developed based on the geographic location of the sites and on the type of households residing at each site (i.e. seniors, disabled individuals, or family households), in order to facilitate linkages with neighborhood-based services.

Services to be Provided

Grantees will provide the following core activities under the listed service areas:

1) Outreach and Community Engagement

- Grantees will develop and maintain channels of communications with tenants through newsletters, tenant meetings, monthly activity calendars, community building activities, and educational programs to foster positive relationships with tenants and enhance community living.

2) Health and Wellness

- Grantees will work to build relationships with neighborhood groups, city agencies, and community-based services providers to develop referral partnerships and onsite programming.
- Grantees will assist tenants towards identified needs and goals, offering needs assessments, information and referral, crisis intervention and counseling, and short-term case management while also working to connect tenants with outside service providers and community services.

3) Housing Stability

- Grantees will provide information and direct outreach to tenants to help them maintain their housing and ensure their specific needs are met. Grantees will assist tenants in

addressing and planning for matters related to housing, delinquent rent payments, safety concerns, remedy of incidences and/or lease violations, conflict resolutions, and communication with property management among other areas.

For more specific information regarding the services to be provided at each senior housing site, please refer to the attached Appendices A.

Grantee Performance

- **Fiscal Monitoring**

All twenty services providers were fiscally monitored for fiscal year 2017-18. The Human Services Agency did not find any significant findings during its annual fiscal monitoring.

- **Program Monitoring**

All service providers were monitored during the months of March and April of 2017 with no significant findings. All providers are in compliance.

Grantee Selection

Contractors were selected through Request for Qualifications, which was competitively bid by the Mayor’s Office of Housing and the Mayor’s Office of Housing and Community Development in February 2014

Funding

Funding for these grants is provided by the City and County General Fund.

Attachments

Table of Rental Assistance Demonstration Programs

Bridge Housing Corporation

Appendix A-1 – Services to be Provided – 3850 18th Street

Appendix B-1 – Program Budget – 3850 18th Street

Appendix A-2 – Services to be Provided – 462 Duboce Ave

Appendix B-2 – Program Budget – 462 Duboce Ave

Appendix A-3 – Services to be Provided – Mission Dolores

Appendix B-3 – Program Budget – Mission Dolores

Appendix A-4 – Services to be Provided – 25 Sanchez Street

Appendix B-4 – Program Budget – 25 Sanchez Street

Appendix A-5 – Services to be Provided – 255 Woodside Ave

Appendix B-5 – Program Budget – 255 Woodside Ave

Chinatown Community Development Center

Appendix A-1 – Services to be Provided – 227 Bay Street

Appendix B-2 – Program Budget – 227 Bay Street

Appendix A-2 – Services to be Provided – 990 Pacific Ave
Appendix B-2 – Program Budget – 990 Pacific Ave

Community Housing Partnership

Appendix A-1 – Services to be Provided – 1750 McAllister Street
Appendix B-1 – Program Budget – 1750 McAllister Street

Appendix A-2 – Services to be Provided – 666 Ellis Street
Appendix B-2 – Program Budget – 666 Ellis Street

Glide Community Housing

Appendix A – Services to be Provided – 350 Ellis Street
Appendix B – Program Budget – 350 Ellis Street

Mercy Housing

Appendix A-1 – Services to be Provided – 345 Arguello Blvd
Appendix B -1– Program Budget – 345 Arguello Blvd

Appendix A-2 – Services to be Provided – 491 31st Ave
Appendix B-2 – Program Budget – 491 31st Ave

Appendix A-3 – Services to be Provided – 1880 Pine Street
Appendix B-3 – Program Budget – 1880 Pine Street

Appendix A-4 – Services to be Provided – 1760 Bush Street
Appendix B-4 – Program Budget – 1760 Bush Street

Appendix A-5 – Services to be Provided – JFK Towers
Appendix B-5 – Program Budget – JFK Towers

Appendix A-6 – Services to be Provided – 2698 California Street
Appendix B-6 – Program Budget – 2698 California Street

Tenderloin Neighborhood Development Corporation

Appendix A-1 – Services to be Provided – 939-51 Eddy Street
Appendix B-1– Program Budget – 939-51 Eddy Street

Appendix A-2 – Services to be Provided – 430 Turk Street
Appendix B-2 – Program Budget – 430 Turk Street

Appendix A-3 – Services to be Provided – 1251 Turk Street
Appendix B-3 – Program Budget – 1251 Turk Street

Appendix A-4 – Services to be Provided – 320-330 Clementina Street
Appendix B-4 – Program Budget – 320-330 Clementina Street

Rental Assistance Demonstration (RAD) Programs

Grantee	Site	7/1/17 – 6/30/18	Contract Amount	Contingency	Total Amount
Bridge Housing Corporation	3850 18 th Street	\$92,656	\$185,312	\$18,531	\$203,843
Bridge Housing Corporation	462 Duboce Ave	\$47,687	\$95,374	\$9,537	\$104,911
Bridge Housing Corporation	Mission Dolores (1855 15 th Street)	\$64,421	\$128,842	\$12,884	\$141,726
Bridge Housing Corporation	25 Sanchez Street	\$63,921	\$127,842	\$12,784	\$140,626
Bridge Housing Corporation	255 Woodside Ave	\$93,406	\$186,812	\$18,681	\$205,493
Chinatown Community Development Center	227 Bay Street	\$49,937	\$99,874	\$9,987	\$109,861
Chinatown Community Development Center	990 Pacific Ave	\$137,374	\$274,748	\$27,475	\$302,223
Community Housing Partnership	1750 McAllister Street	\$65,671	\$131,342	\$13,134	\$144,476
Community Housing Partnership	666 Ellis Street	\$66,421	\$132,842	\$13,284	\$146,126
GLIDE Community Housing Inc.	350 Ellis Street	\$65,421	\$130,842	\$13,084	\$143,926
Mercy Housing California	1760 Bush Street	\$92,906	\$185,812	\$18,581	\$204,393
Mercy Housing California	1880 Pine Street	\$94,156	\$188,312	\$18,831	\$207,143
Mercy Housing California	2698 California Street	\$47,187	\$94,374	\$9,437	\$103,811
Mercy Housing California	345 Arguello Blvd	\$34,187	\$68,374	\$6,837	\$75,211
Mercy Housing California	491 31 st Ave	\$35,687	\$71,374	\$7,137	\$78,511
Mercy Housing California	JFK Towers (2451 Sacramento Street)	\$65,921	\$131,842	\$13,184	\$145,026

Tenderloin Neighborhood Development Corp	320-330 Clementina Street	\$274,264	\$548,528	\$54,853	\$603,381
Tenderloin Neighborhood Development Corp	430 Turk Street	\$63,671	\$127,342	\$12,734	\$140,076
Tenderloin Neighborhood Development Corp	939-951 Eddy Street	\$31,937	\$63,874	\$6,387	\$70,261
Tenderloin Neighborhood Development Corp	Rosa Parks (1251 Turk Street)	\$132,343	\$264,686	\$26,469	\$291,155
Total		\$1,619,174	\$3,238,348	\$323,831	\$3,562,179

**APPENDIX A-1 – SERVICES TO BE PROVIDED
BRIDGE HOUSING CORPORATION**

**RAD Housing Support Services at 3850 18th Street
July 1, 2017 through June 30, 2019**

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted housing development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that results in substantial functional limitations in one or more major life activity.
Grantee	BRIDGE Housing Corporation
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted housing development units at 3850 18th Street.

IV. Description of Services

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities
 - Build tenant base
 - Develop neighborhood partnerships

- 2) Community Building
 - Facilitate community organizing and host events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase access to information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities

- 3) Service Connection
 - Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will hire, train, and supervise 1.50 FTE (leveraged and/or grant funded) to provide services at 3850 18th Street during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.
- Staff will make efforts to contact all new tenants to invite them to make use of support services and inform them of community activities.
- Staff will make efforts to contact, interact, inform, and invite all tenants to make uses of support services to assist with and address individual needs or issues. These efforts will include a variety of outreach techniques such as written messages in appropriate languages, flyers, brochures, telephone calls, open house events, and emails as available.

Health and Wellness:

- Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.
- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.
- Assist tenants in identifying and accessing community services needed to meet tenant's specific needs or to make progress toward identified goals.

Housing Stability:

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.
- Staff will provide information on various topics that will help tenants maintain their housing; provide assistance in communicating with, responding to, and meeting with property management to help tenants resolve issues related to housing; provide assistance in the remedy of incidences and/or lease violations that could lead to eviction by establishing written plans; and/or provide assistance with conflict resolution for tenants who need to solve problems or resolve conflicts with other tenants.

Community Engagement:

- Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.
- Staff will provide tenants with opportunities to participate in organized gatherings for peer support, social connections, celebrations/commemorations, and other community events held onsite.
- Staff will provide trainings and educational workshops on a variety of topics relating to health, wellness, finance, housing, and other topics.

V. Location and Time of Services

Services will be provided at 3850 18th Street, Monday through Friday, during regular office hours of 9 a.m. to 5 p.m., excluding holidays. On occasion, workshops or events will be provided after hours or on weekends.

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.
- Grantee will communicate and collaborate regularly with DAAS to help provide logistical and operational support to the program and to provide quality services to tenants.
- Grantee will work collaboratively with DAAS to strategize program direction and services provision.
- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
- Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, and provide documentation that tracks demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Grantee will have individual and group service encounters with at least 50% of the tenants per month.
- Grantee will provide to tenants a minimum of one (1) activity or event per week (or 52 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.

- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel “strongly” or “very strongly” about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: “How strongly do you feel about being connected and involved in the tenant/resident community at [site]? The options should be “Very strongly”, “Strongly”, “Somewhat”, “Not at all”.
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will “agree” or “highly agree” that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: “Do you have better access to services that improve your health and wellness?” The options should be “Highly agree”, “Agree”, “Neutral”, “Disagree”, “Highly disagree”.
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
 - Number and percentage of unduplicated tenants with individual and group service encounters.
 - Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.

- Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with “strongly” or “very strongly” when asked about being connected and involved in their tenant/resident community.
- Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with “agree” or “highly agree” when asked about having better access to services that improve their health and wellness.
- Number and percentage of households that have maintained or have obtained a stable housing.

C. Grantee will provide Ad Hoc reports as required by the Department.

D. For assistance with reporting requirements or submission of reports, contact:

Rocio.Duenas@sfgov.org
 Contract Manager, Office of Contract Management
 Human Services Agency

or

Fanny.Lapitan@sfgov.org
 Program Analyst, Long Term Care Operations
 Department of Aging and Adult Services

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	E
1	Appendix B-1, Page 1			
2	Document Date: 4/18/2017			
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY			
4	BY PROGRAM			
5	Contractor's Name		Contract Term:	
6	BRIDGE Housing Corporation		7/1/2017 - 6/30/2019	
7	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification			
8	If modification, Effective Date of Mod. No. of Mod.			
9	Program: Rental Assistance Demonstration - 18th Street			
10	Budget Reference Page No.(s)			TOTAL
11	Program Term	7/1/17 - 6/30/18	7/1/18 - 6/30/19	7/1/17-6/30/19
12	Human Services Agency Expenditures			
13	Salaries & Benefits	\$0	\$0	\$0
14	Operating Expense	\$82,729	\$84,052	\$166,781
15	Capital Expenditure	\$0	\$0	\$0
16	Subtotal	\$82,729	\$84,052	\$166,781
17	Indirect Percentage (%)	12.00%	10.24%	
18	Indirect Cost (Line 16 X Line 17)	\$9,927	\$8,604	\$18,531
19	Total HSA Expenditures	\$92,656	\$92,656	\$185,312
20	Developer Match Expenditures			
21	Salaries & Benefits	\$0	\$0	\$0
22	Operating Expense	\$72,321	\$73,479	\$145,800
23	Capital Expenditure	\$0	\$0	\$0
24	Subtotal	\$72,321	\$73,479	\$145,800
25	Indirect Percentage (%)	12.00%	10.24%	
26	Indirect Cost (Line 16 X Line 17)	\$8,678	\$7,522	\$16,200
27	Total Developer Expenditures	\$80,999	\$81,001	\$162,000
28				
29	Total HSA and Developer Expenditures	\$173,656	\$173,656	\$347,312
30	HSA Revenues			
31	Local General Fund	\$92,656	\$92,656	\$185,312
32				
33				
34				
35				
36				
37				
38				
39	TOTAL HSA REVENUES	\$92,656	\$92,656	\$185,312
40	Developer Revenues			
41	Developer Match Funds	\$81,000	\$81,000	\$162,000
42				\$0
43				\$0
44				\$0
45	Total Developer Revenues	\$81,000	\$81,000	\$162,000
46	Total Revenues	\$173,656	\$173,656	\$347,312
47	Full Time Equivalent (FTE)	1.99		
49	Prepared by: Susan Neufeld	Telephone No.: 415-321-3526	Date 4/18/17	
50	HSA-CO Review Signature: _____			
51	HSA #1			
52				

**APPENDIX A-2 – SERVICES TO BE PROVIDED
BRIDGE HOUSING CORPORATION**

**RAD Housing Support Services at 462 Duboce Avenue
July 1, 2017 through June 30, 2019**

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that result in substantial functional limitations in one or more major life activity.
Grantee	BRIDGE Housing Corporation
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units at 462 Duboce Avenue.

IV. Description of Services

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities
 - Build tenant base
 - Develop neighborhood partnerships

- 2) Community Building
 - Community organizing and events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities

- 3) Service Connection
 - Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will hire, train, and supervise 1.0 FTE (leveraged and/or grant funded) to provide services at 462 Duboce Avenue during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.
- Staff will make efforts to contact all new tenants to invite them to make use of support services and inform them of community activities.
- Staff will make efforts to contact, interact, inform, and invite all tenants to make uses of support services to assist with and address individual needs or issues. These efforts will include a variety of outreach techniques such as written messages in appropriate languages, flyers, brochures, telephone calls, open house events, and emails as available.

Health and Wellness:

- Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.
- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.
- Staff will assist tenants identify and access community services needed to meet tenant's specific needs or to make progress toward identified goals.

Housing Stability:

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.
- Staff will provide information on various topics that will help tenants maintain their housing; provide assistance in communicating with, responding to, and meeting with property management to help tenants resolve issues related to housing; provide assistance in the remedy of incidences and/or lease violations that could lead to eviction by establishing written plans; and/or provide assistance with conflict resolution for tenants who need to solve problems or resolve conflicts with other tenants.

Community Engagement:

- Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.
- Staff will provide tenants with opportunities to participate in organized gatherings for peer support, social connections, celebrations/commemorations, and other community events held onsite.
- Staff will provide trainings and educational workshops on a variety of topics relating to health, wellness, finance, housing, and other topics.

V. Location and Time of Services

Services will be provided at 462 Duboce Avenue, Monday through Friday during regular office hours of 9 a.m. to 5 p.m., excluding holidays. On occasion, workshops or events will be provided after hours or on weekends. In addition, some events and activities will be offered in the community room at 25 Sanchez to accommodate a larger group size.

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.
- Grantee will communicate and collaborate regularly with DAAS to help provide logistical and operational support to the program and to provide quality services to tenants.
- Grantee will work collaboratively with DAAS to strategize program direction and services provision.
- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
- Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, and provide documentation that tracks demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Grantee will have individual and group service encounters with at least 65% of the tenants per month.
- Grantee will provide to tenants a minimum of two (2) activities or events per week (or 104 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.

- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel “strongly” or “very strongly” about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: “How strongly do you feel about being connected and involved in the tenant/resident community at [site]? The options should be “Very strongly”, “Strongly”, “Somewhat”, “Not at all”.
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will “agree” or “highly agree” that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: “Do you have better access to services that improve your health and wellness?” The options should be “Highly agree”, “Agree”, “Neutral”, “Disagree”, “Highly disagree”.
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
 - Number and percentage of unduplicated tenants with individual and group service encounters.
 - Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.

- Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with “strongly” or “very strongly” when asked about being connected and involved in their tenant/resident community.
- Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with “agree” or “highly agree” when asked about having better access to services that improve their health and wellness.
- Number and percentage of households that have maintained or have obtained a stable housing.

C. Grantee will provide Ad Hoc reports as required by the Department.

D. For assistance with reporting requirements or submission of reports, contact:

Rocio.Duenas@sfgov.org
 Contract Manager, Office of Contract Management
 Human Services Agency

or

Fanny.Lapitan@sfgov.org
 Program Analyst, Long Term Care Operations
 Department of Aging and Adult Services

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	E
1	Appendix B-2, Page 1			
2	Document Date: 4/18/2017			
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY			
4	BY PROGRAM			
5	Contractor's Name		Contract Term:	
6	BRIDGE Housing Corporation		July 1, 2017 - June 30, 2019	
7	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification			
8	If modification, Effective Date of Mod. No. of Mod.			
9	Program: Rental Assistance Demonstration - 462 Duboce			
10	Budget Reference Page No.(s)			TOTAL
11	Program Term	7/1/17 - 6/30/18	7/1/18 - 6/30/19	7/1/17-6/30/19
12	Human Services Agency Expenditures			
13	Salaries & Benefits	\$0	\$0	\$0
14	Operating Expense	\$43,935	\$44,677	\$88,612
15	Capital Expenditure	\$0	\$0	\$0
16	Subtotal	\$43,935	\$44,677	\$88,612
17	Indirect Percentage (%)	8.54%	6.74%	
18	Indirect Cost (Line 16 X Line 17)	\$3,752	\$3,010	\$6,762
19	Total HSA Expenditures	\$47,687	\$47,687	\$95,374
20	Developer Match Expenditures			
21	Salaries & Benefits	\$0	\$0	\$0
22	Operating Expense	\$55,970	\$56,915	\$112,885
23	Capital Expenditure	\$0	\$0	\$0
24	Subtotal	\$55,970	\$56,915	\$112,885
25	Indirect Percentage (%)	8.54%	6.74%	
26	Indirect Cost (Line 16 X Line 17)	\$4,780	\$3,835	\$8,615
27	Total Developer Expenditures	\$60,750	\$60,750	\$121,500
28				
29	Total HSA and Developer Expenditures	\$108,437	\$108,437	\$216,874
30	HSA Revenues			
31	Local General Fund	\$47,687	\$47,687	\$95,374
32				
33				
34				
35				
36				
37				
38				
39	TOTAL HSA REVENUES	\$47,687	\$47,687	\$95,374
40	Developer Revenues			
41	Developer Match Funds	\$60,750	\$60,750	\$121,500
42				\$0
43				\$0
44				\$0
45	Total Developer Revenues	\$60,750	\$60,750	\$121,500
46	Total Revenues	\$108,437	\$108,437	\$216,874
47	Full Time Equivalent (FTE)	1.20		
49	Prepared by: Susan Neufeld	Telephone No.: 415-321-3526	Date 4/18/17	
50	HSA-CO Review Signature: _____			
51	HSA #1			
52				

Contractor's Name: BRIDGE Housing Corporation

Operating Expense Detail

		Human Services Agency	Human Services Agency	TOTAL
	TERM	7/1/17 - 6/30/18	7/1/18 - 6/30/19	7/1/17-6/30/19
9	<u>HSA Expenditure Category</u>			
11	Rental of Property			
12	Telephone and Office Furniture			
13	Program/Office Supplies	\$ 1,400	\$ 1,400	\$ 2,800
14	Utilities (Electricity, Water, Sewer, Gas, Phone)	\$ 1,800	\$ 1,800	\$ 3,600
15	Printing and Reproduction	\$ 20	\$ 20	\$ 40
16	Insurance			
17	Staff Travel (Local & Out of Town)	\$ 100	\$ 100	\$ 200
18	Law Library			
19	Membership/Dues			
20	Rental of Equipment			
21	Senior Right Bulletin			
22				
23	Staff Training	\$ 450	\$ 450	\$ 900
24	Sub-Contractor (NCPHS)	\$ 39,365	\$ 40,107	\$ 79,472
25	OTHER			
26	Language Line			
27	Pangea/AASC Database	\$ 800	\$ 800	\$ 1,600
28	Educational Programs			
29				
30				
31	TOTAL HSA OPERATING EXPENSE	\$ 43,935	\$ 44,677	\$ 88,612
32				
33	<u>Developer Match Operating Expense</u>			
34	Rental of Property			
35	Telephone and Furniture			
36	Office Supplies, Postage			
37	Printing and Reproduction			
38	Insurance			
39	Law Library			
40	Membership/Dues			
41	Rental of Equipment			
42	Volunteer Expenses (Receptionist/intake)			
43	Client Costs			
44	Educational Programs			
45	Charting			
46	Staff Training			
47	Sub-Contractor (NCPHS)	\$ 55,970	\$ 56,915	\$ 112,885
48				
49	TOTAL DEVELOPER OPERATING EXPENSE	\$ 55,970	\$ 56,915	\$ 112,885
50				
51	TOTAL OPERATING EXPENSE	\$ 99,905	\$ 101,592	\$ 201,497
52				
53	HSA #3			

**APPENDIX A-3 – SERVICES TO BE PROVIDED
BRIDGE HOUSING CORPORATION**

**RAD Housing Support Services at Mission Dolores (1855 15th Street)
July 1, 2017 through June 30, 2019**

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that results in substantial functional limitations in one or more major life activity.
Grantee	BRIDGE Housing Corporation
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted housing development units at Mission Dolores (1855 15th Street).

IV. Description of Services

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities
 - Build tenant base
 - Develop neighborhood partnerships

- 2) Community Building
 - Facilitate community organizing and host events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase access to information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities

- 3) Service Connection
 - Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will hire, train, and supervise 1.25 FTE (leveraged and/or grant funded) to provide services at Mission Dolores (1855 15th Street) during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.
- Staff will make efforts to contact all new tenants to invite them to make use of support services and inform them of community activities.
- Staff will make efforts to contact, interact, inform, and invite all tenants to make uses of support services to assist with and address individual needs or issues. These efforts will include a variety of outreach techniques such as written messages in appropriate languages, flyers, brochures, telephone calls, open house events, and emails as available.

Health and Wellness:

- Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.
- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.
- Staff will assist tenants identify and access community services needed to meet tenant's specific needs or to make progress toward identified goals.

Housing Stability:

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.
- Staff will provide information on various topics that will help tenants maintain their housing; provide assistance in communicating with, responding to, and meeting with property management to help tenants resolve issues related to housing; provide assistance in the remedy of incidences and/or lease violations that could lead to eviction by establishing written plans; and/or provide assistance with conflict resolution for tenants who need to solve problems or resolve conflicts with other tenants.

Community Engagement:

- Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.
- Staff will provide tenants with opportunities to participate in organized gatherings for peer support, social connections, celebrations/commemorations, and other community events held onsite.
- Staff will provide trainings and educational workshops on a variety of topics relating to health, wellness, finance, housing, and other topics.

V. Location and Time of Services

Services will be provided at Mission Dolores (1855 15th Street), Monday through Friday, during regular office hours of 9 a.m. to 5 p.m., excluding holidays. On occasion, workshops or events will be provided after hours or on weekends.

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.
- Grantee will communicate and collaborate regularly with DAAS to help provide logistical and operational support to the program and to provide quality services to tenants.
- Grantee will work collaboratively with DAAS to strategize program direction and services provision.
- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
- Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, and provide documentation that tracks demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Grantee will have individual and group service encounters with at least 50% of the tenants per month.
- Grantee will provide to tenants a minimum of one (1) activity or event per week (or 52 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.

- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel “strongly” or “very strongly” about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: “How strongly do you feel about being connected and involved in the tenant/resident community at [site]? The options should be “Very strongly”, “Strongly”, “Somewhat”, “Not at all”.
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will “agree” or “highly agree” that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: “Do you have better access to services that improve your health and wellness?” The options should be “Highly agree”, “Agree”, “Neutral”, “Disagree”, “Highly disagree”.
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
 - Number and percentage of unduplicated tenants with individual and group service encounters.
 - Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.

- Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with “strongly” or “very strongly” when asked about being connected and involved in their tenant/resident community.
- Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with “agree” or “highly agree” when asked about having better access to services that improve their health and wellness.
- Number and percentage of households that have maintained or have obtained a stable housing.

C. Grantee will provide Ad Hoc reports as required by the Department.

D. For assistance with reporting requirements or submission of reports, contact:

Rocio.Duenas@sfgov.org
 Contract Manager, Office of Contract Management
 Human Services Agency

or

Fanny.Lapitan@sfgov.org
 Program Analyst, Long Term Care Operations
 Department of Aging and Adult Services

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	E
1	Appendix B-3, Page 1			
2	Document Date: 4/18/2017			
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY			
4	BY PROGRAM			
5	Contractor's Name		Contract Term:	
6	BRIDGE Housing Corporation		7/1/2017 - 6/30/2019	
7	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification			
8	If modification, Effective Date of Mod. No. of Mod.			
9	Program: Rental Assistance Demonstration - 15th Street Mission Dolores			
10	Budget Reference Page No.(s)			TOTAL
11	Program Term	7/1/17 - 6/30/18	7/1/18 - 6/30/19	7/1/17-6/30/19
12	Human Services Agency Expenditures			
13	Salaries & Benefits	\$0	\$0	\$0
14	Operating Expense	\$57,519	\$58,565	\$116,084
15	Capital Expenditure	\$0	\$0	\$0
16	Subtotal	\$57,519	\$58,565	\$116,084
17	Indirect Percentage (%)	12.00%	10.00%	
18	Indirect Cost (Line 16 X Line 17)	\$6,902	\$5,856	\$12,759
19	Total HSA Expenditures	\$64,421	\$64,421	\$128,842
20	Developer Match Expenditures			
21	Salaries & Benefits	\$0	\$0	\$0
22	Operating Expense	\$72,321	\$73,636	\$145,958
23	Capital Expenditure	\$0	\$0	\$0
24	Subtotal	\$72,321	\$73,636	\$145,958
25	Indirect Percentage (%)	12.00%	10.00%	
26	Indirect Cost (Line 16 X Line 17)	\$8,679	\$7,364	\$16,043
27	Total Developer Expenditures	\$81,000	\$81,000	\$162,000
28				
29	Total HSA and Developer Expenditures	\$145,422	\$145,421	\$290,843
30	HSA Revenues			
31	Local General Fund	\$64,421	\$64,421	\$128,842
32				
33				
34				
35				
36				
37				
38				
39	TOTAL HSA REVENUES	\$64,421	\$64,421	\$128,842
40	Developer Revenues			
41	Developer Match Funds	\$81,000	\$81,000	\$162,000
42				\$0
43				\$0
44				\$0
45	Total Developer Revenues	\$81,000	\$81,000	\$162,000
46	Total Revenues	\$145,421	\$145,421	\$290,842
47	Full Time Equivalent (FTE)	1.60		
49	Prepared by:	Susan Neufeld	Telephone No.	Date 4/18/17
50	HSA-CO Review Signature:	_____		
51	HSA #1			
52				

Contractor's Name: BRIDGE Housing Corporation

Operating Expense Detail

		Human Services Agency	Human Services Agency	TOTAL
	TERM	7/1/17 - 6/30/18	7/1/18 - 6/30/19	7/1/17-6/30/19
9	<u>HSA Expenditure Category</u>			
11	Rental of Property			
12	Telephone and Office Furniture			
13	Program/Office Supplies			
14	Utilities (Electricity, Water, Sewer, Gas, Phone)	\$ 300	\$ 300	\$ 600
15	Printing and Reproduction	\$ 20	\$ 20	\$ 40
16	Insurance			
17	Staff Travel (Local & Out of Town)	\$ 100	\$ 110	\$ 210
18	Law Library			
19	Membership/Dues			
20	Rental of Equipment			
21	Senior Right Bulletin			
22				
23	Staff Training			
24	Sub-Contractor (NCPHS)	\$ 55,499	\$ 56,535	\$ 112,034
25	OTHER			
26	Language Line			
27	Pangea/AASC Database	\$ 1,600	\$ 1,600	\$ 3,200
28	Educational Programs			
29				
30				
31	TOTAL HSA OPERATING EXPENSE	\$ 57,519	\$ 58,565	\$ 116,084
32				
33	<u>Developer Match Operating Expense</u>			
34	Rental of Property			
35	Telephone and Furniture			
36	Office Supplies, Postage			
37	Printing and Reproduction			
38	Insurance			
39	Law Library			
40	Membership/Dues			
41	Rental of Equipment			
42	Volunteer Expenses (Receptionist/intake)			
43	Client Costs			
44	Educational Programs			
45	Charting			
46	Staff Training			
47	Sub-Contractor (NCPHS)	\$ 72,321	\$ 73,636	\$ 145,958
48				
49	TOTAL DEVELOPER OPERATING EXPENSE	\$ 72,321	\$ 73,636	\$ 145,958
50				
51	TOTAL OPERATING EXPENSE	\$ 129,840	\$ 132,201	\$ 262,041
52				
53	HSA #3			

**APPENDIX A-4 – SERVICES TO BE PROVIDED
BRIDGE HOUSING CORPORATION**

**RAD Housing Support Services at 25 Sanchez Street
July 1, 2017 through June 30, 2019**

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that result in substantial functional limitations in one or more major life activity.
Grantee	BRIDGE Housing Corporation
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units at 25 Sanchez Street.

IV. Description of Services

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities
 - Build tenant base
 - Develop neighborhood partnerships

- 2) Community Building
 - Community organizing and events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities

- 3) Service Connection
 - Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will hire, train, and supervise 1.25 FTE (leveraged and/or grant funded) to provide services at 25 Sanchez Street during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.
- Staff will make efforts to contact all new tenants to invite them to make use of support services and inform them of community activities.
- Staff will make efforts to contact, interact, inform, and invite all tenants to make uses of support services to assist with and address individual needs or issues. These efforts will include a variety of outreach techniques such as written messages in appropriate languages, flyers, brochures, telephone calls, open house events, and emails as available.

Health and Wellness:

- Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.
- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.
- Staff will assist tenants identify and access community services needed to meet tenant's specific needs or to make progress toward identified goals.

Housing Stability:

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.
- Staff will provide information on various topics that will help tenants maintain their housing; provide assistance in communicating with, responding to, and meeting with property management to help tenants resolve issues related to housing; provide assistance in the remedy of incidences and/or lease violations that could lead to eviction by establishing written plans; and/or provide assistance with conflict resolution for tenants who need to solve problems or resolve conflicts with other tenants.

Community Engagement:

- Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.
- Staff will provide tenants with opportunities to participate in organized gatherings for peer support, social connections, celebrations/commemorations, and other community events held onsite.
- Staff will provide trainings and educational workshops on a variety of topics relating to health, wellness, finance, housing, and other topics.

V. Location and Time of Services

Services will be provided at 25 Sanchez Street, Monday through Friday during regular office hours of 9 a.m. to 5 p.m., excluding holidays. On occasion, workshops or events will be provided after hours or on weekends.

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.
- Grantee will communicate and collaborate regularly with DAAS to help provide logistical and operational support to the program and to provide quality services to tenants.
- Grantee will work collaboratively with DAAS to strategize program direction and services provision.
- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
- Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, and provide documentation that tracks demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Grantee will have individual and group service encounters with at least 65% of the tenants per month.
- Grantee will provide to tenants a minimum of two (2) activities or events per week (or 104 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.

- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel “strongly” or “very strongly” about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: “How strongly do you feel about being connected and involved in the tenant/resident community at [site]? The options should be “Very strongly”, “Strongly”, “Somewhat”, “Not at all”.
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will “agree” or “highly agree” that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: “Do you have better access to services that improve your health and wellness?” The options should be “Highly agree”, “Agree”, “Neutral”, “Disagree”, “Highly disagree”.
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
 - Number and percentage of unduplicated tenants with individual and group service encounters.
 - Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.

- Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with “strongly” or “very strongly” when asked about being connected and involved in their tenant/resident community.
- Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with “agree” or “highly agree” when asked about having better access to services that improve their health and wellness.
- Number and percentage of households that have maintained or have obtained a stable housing.

C. Grantee will provide Ad Hoc reports as required by the Department.

D. For assistance with reporting requirements or submission of reports, contact:

Rocio.Duenas@sfgov.org
 Contract Manager, Office of Contract Management
 Human Services Agency

or

Fanny.Lapitan@sfgov.org
 Program Analyst, Long Term Care Operations
 Department of Aging and Adult Services

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	E
1	Appendix B-4, Page 1			
2	Document Date: 4/18/2017			
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY			
4	BY PROGRAM			
5	Contractor's Name		Contract Term:	
6	BRIDGE Housing Corporation		7/1/2017 - 6/30/2019	
7	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification			
8	If modification, Effective Date of Mod. No. of Mod.			
9	Program: Rental Assistance Demonstration - 25 Sanchez			
10	Budget Reference Page No.(s)			TOTAL
11	Program Term	7/1/17 - 6/30/18	7/1/18 - 6/30/19	7/1/17-6/30/19
12	Human Services Agency Expenditures			
13	Salaries & Benefits	\$0	\$0	\$0
14	Operating Expense	\$57,687	\$58,697	\$116,384
15	Capital Expenditure	\$0	\$0	\$0
16	Subtotal	\$57,687	\$58,697	\$116,384
17	Indirect Percentage (%)	10.81%	8.90%	
18	Indirect Cost (Line 16 X Line 17)	\$6,234	\$5,224	\$11,458
19	Total HSA Expenditures	\$63,921	\$63,921	\$127,842
20	Developer Match Expenditures			
21	Salaries & Benefits	\$0	\$0	\$0
22	Operating Expense	\$73,100	\$74,380	\$147,480
23	Capital Expenditure	\$0	\$0	\$0
24	Subtotal	\$73,100	\$74,380	\$147,480
25	Indirect Percentage (%)	10.81%	8.90%	
26	Indirect Cost (Line 16 X Line 17)	\$7,900	\$6,620	\$14,520
27	Total Developer Expenditures	\$81,000	\$81,000	\$162,000
28				
29	Total HSA and Developer Expenditures	\$144,921	\$144,921	\$289,842
30	HSA Revenues			
31	Local General Fund	\$63,921	\$63,921	\$127,842
32				
33				
34				
35				
36				
37				
38				
39	TOTAL HSA REVENUES	\$63,921	\$63,921	\$127,842
40	Developer Revenues			
41	Developer Match Funds	\$81,000	\$81,000	\$162,000
42				\$0
43				\$0
44				\$0
45	Total Developer Revenues	\$81,000	\$81,000	\$162,000
46	Total Revenues	\$144,921	\$144,921	\$289,842
47	Full Time Equivalent (FTE)	1.60		
49	Prepared by: Susan Neufeld	Telephone No.: 415-321-3526	Date 4/18/17	
50	HSA-CO Review Signature: _____			
51	HSA #1			
52				

Contractor's Name: BRIDGE Housing Corporation

Operating Expense Detail

		Human Services Agency	Human Services Agency	TOTAL
	TERM	7/1/17 - 6/30/18	7/1/18 - 6/30/19	7/1/17-6/30/19
9	<u>HSA Expenditure Category</u>			
11	Rental of Property			
12	Telephone and Office Furniture			
13	Program/Office Supplies	\$ 1,400	\$ 1,400	\$ 2,800
14	Utilities (Electricity, Water, Sewer, Gas, Phone)	\$ 155	\$ 155	\$ 310
15	Printing and Reproduction	\$ 40	\$ 40	\$ 80
16	Insurance			
17	Staff Travel (Local & Out of Town)	\$ 200	\$ 200	\$ 400
18	Law Library			
19	Membership/Dues			
20	Rental of Equipment			
21	Senior Right Bulletin			
22				
23	Staff Training	\$ 745	\$ 745	\$ 1,490
24	Sub-Contractor (NCPHS)	\$ 53,827	\$ 54,837	\$ 108,664
25	OTHER			
26	Language Line			
27	Pangea/AASC Database	\$ 1,320	\$ 1,320	\$ 2,640
28	Educational Programs			
29				
30				
31	TOTAL HSA OPERATING EXPENSE	\$ 57,687	\$ 58,697	\$ 116,384
32				
33	<u>Developer Match Operating Expense</u>			
34	Rental of Property			
35	Telephone and Furniture			
36	Office Supplies, Postage			
37	Printing and Reproduction			
38	Insurance			
39	Law Library			
40	Membership/Dues			
41	Rental of Equipment			
42	Volunteer Expenses (Receptionist/intake)			
43	Client Costs			
44	Educational Programs			
45	Charting			
46	Staff Training			
47	Sub-Contractor (NCPHS)	\$ 73,100	\$ 74,380	\$ 147,480
48				
49	TOTAL DEVELOPER OPERATING EXPENSE	\$ 73,100	\$ 74,380	\$ 147,480
50				
51	TOTAL OPERATING EXPENSE	\$ 130,787	\$ 133,077	\$ 263,864
52				
53	HSA #3			

**APPENDIX A-5 – SERVICES TO BE PROVIDED
BRIDGE HOUSING CORPORATION**

**RAD Housing Support Services at 255 Woodside Avenue
July 1, 2017 through June 30, 2019**

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that results in substantial functional limitations in one or more major life activity.
Grantee	BRIDGE Housing Corporation
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units at 255 Woodside Avenue.

IV. Description of Services

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities
 - Build tenant base
 - Develop neighborhood partnerships

- 2) Community Building
 - Community organizing and events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities

- 3) Service Connection
 - Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will hire, train, and supervise 1.5 FTE (leveraged and/or grant funded) to provide services at 255 Woodside Avenue during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.
- Staff will make efforts to contact all new tenants to invite them to make use of support services and inform them of community activities.
- Staff will make efforts to contact, interact, inform, and invite all tenants to make uses of support services to assist with and address individual needs or issues. These efforts will include a variety of outreach techniques such as written messages in appropriate languages, flyers, brochures, telephone calls, open house events, and emails as available.

Health and Wellness:

- Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.
- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.
- Staff will assist tenants identify and access community services needed to meet tenant's specific needs or to make progress toward identified goals.

Housing Stability:

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.
- Staff will provide information on various topics that will help tenants maintain their housing; provide assistance in communicating with, responding to, and meeting with property management to help tenants resolve issues related to housing; provide assistance in the remedy of incidences and/or lease violations that could lead to eviction by establishing written plans; and/or provide assistance with conflict resolution for tenants who need to solve problems or resolve conflicts with other tenants.

Community Engagement:

- Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.
- Staff will provide tenants with opportunities to participate in organized gatherings for peer support, social connections, celebrations/commemorations, and other community events held onsite.
- Staff will provide trainings and educational workshops on a variety of topics relating to health, wellness, finance, housing, and other topics.

V. Location and Time of Services

Services will be provided at 255 Woodside Avenue, Monday through Friday during regular office hours of 9 a.m. to 5 p.m., excluding holidays. On occasion, workshops or events will be provided after hours or on weekends.

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.
- Grantee will communicate and collaborate regularly with DAAS to help provide logistical and operational support to the program and to provide quality services to tenants.
- Grantee will work collaboratively with DAAS to strategize program direction and services provision.
- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
- Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, and provide documentation that tracks demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Grantee will have individual and group service encounters with at least 65% of the tenants per month.
- Grantee will provide to tenants a minimum of two (2) activities or events per week (or 104 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.

- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel “strongly” or “very strongly” about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: “How strongly do you feel about being connected and involved in the tenant/resident community at [site]? The options should be “Very strongly”, “Strongly”, “Somewhat”, “Not at all”.
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will “agree” or “highly agree” that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: “Do you have better access to services that improve your health and wellness?” The options should be “Highly agree”, “Agree”, “Neutral”, “Disagree”, “Highly disagree”.
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
 - Number and percentage of unduplicated tenants with individual and group service encounters.
 - Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.

- Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with “strongly” or “very strongly” when asked about being connected and involved in their tenant/resident community.
- Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with “agree” or “highly agree” when asked about having better access to services that improve their health and wellness.
- Number and percentage of households that have maintained or have obtained a stable housing.

C. Grantee will provide Ad Hoc reports as required by the Department.

D. For assistance with reporting requirements or submission of reports, contact:

Rocio.Duenas@sfgov.org
 Contract Manager, Office of Contract Management
 Human Services Agency

or

Fanny.Lapitan@sfgov.org
 Program Analyst, Long Term Care Operations
 Department of Aging and Adult Services

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	E
1	Appendix B-5, Page 1			
2	Document Date: 4/18/2017			
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY			
4	BY PROGRAM			
5	Contractor's Name		Contract Term:	
6	BRIDGE Housing Corporation		6/1/2017 - 7/30/2019	
7	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification			
8	If modification, Effective Date of Mod. No. of Mod.			
9	Program: Rental Assistance Demonstration - 255 Woodside			
10	Budget Reference Page No.(s)			TOTAL
11	Program Term			7/1/17 - 6/30/18 7/1/18 - 6/30/19 7/1/17-6/30/19
12	Human Services Agency Expenditures			
13	Salaries & Benefits			\$0 \$0 \$0
14	Operating Expense			\$81,935 \$83,099 \$165,034
15	Capital Expenditure			\$0 \$0 \$0
16	Subtotal			\$81,935 \$83,099 \$165,034
17	Indirect Percentage (%)			14.00% 12.40%
18	Indirect Cost (Line 16 X Line 17)			\$11,471 \$10,308 \$21,778
19	Total HSA Expenditures			\$93,406 \$93,406 \$186,812
20	Developer Match Expenditures			
21	Salaries & Benefits			\$0 \$0 \$0
22	Operating Expense			\$71,053 \$72,061 \$143,114
23	Capital Expenditure			\$0 \$0 \$0
24	Subtotal			\$71,053 \$72,061 \$143,114
25	Indirect Percentage (%)			14.00% 12.40%
26	Indirect Cost (Line 16 X Line 17)			\$9,947 \$8,939 \$18,886
27	Total Developer Expenditures			\$81,000 \$81,000 \$162,000
28				
29	Total HSA and Developer Expenditures			\$174,406 \$174,406 \$348,812
30	HSA Revenues			
31	Local General Fund			\$93,406 \$93,406 \$186,812
32				
33				
34				
35				
36				
37				
38				
39	TOTAL HSA REVENUES			\$93,406 \$93,406 \$186,812
40	Developer Revenues			
41	Developer Match Funds			\$81,000 \$81,000 \$162,000
42				\$0
43				\$0
44				\$0
45	Total Developer Revenues			\$81,000 \$81,000 \$162,000
46	Total Revenues			\$174,406 \$174,406 \$348,812
47	Full Time Equivalent (FTE)			1.80
49	Prepared by: Susan Neufeld		Telephone No.: 415-321-3526	Date 4/18/17
50	HSA-CO Review Signature: _____			
51	HSA #1			
52				

Contractor's Name: BRIDGE Housing Corporation

Operating Expense Detail

		Human Services Agency	Human Services Agency	TOTAL
	TERM	7/1/17 - 6/30/18	7/1/18 - 6/30/19	7/1/17-6/30/19
9	<u>HSA Expenditure Category</u>			
11	Rental of Property			
12	Telephone and Office Furniture			
13	Program/Office Supplies	\$ 1,523	\$ 1,659	\$ 3,182
14	Utilities (Electricity, Water, Sewer, Gas, Phone)	\$ 1,300	\$ 1,300	\$ 2,600
15	Printing and Reproduction	\$ 40	\$ 40	\$ 80
16	Insurance			
17	Staff Travel (Local & Out of Town)	\$ 200	\$ 200	\$ 400
18	Law Library			
19	Membership/Dues			
20	Rental of Equipment			
21	Senior Right Bulletin			
22				
23	Staff Training	\$ 900	\$ 900	\$ 1,800
24	Sub-Contractor (NCPHS)	\$ 76,372	\$ 77,400	\$ 153,772
25	OTHER			
26	Language Line			
27	Pangea/AASC Database	\$ 1,600	\$ 1,600	\$ 3,200
28	Educational Programs			
29				
30				
31	TOTAL HSA OPERATING EXPENSE	\$ 81,935	\$ 83,099	\$ 165,034
32				
33	<u>Developer Match Operating Expense</u>			
34	Rental of Property			
35	Telephone and Furniture			
36	Office Supplies, Postage			
37	Printing and Reproduction			
38	Insurance			
39	Law Library			
40	Membership/Dues			
41	Rental of Equipment			
42	Volunteer Expenses (Receptionist/intake)			
43	Client Costs			
44	Educational Programs			
45	Charting			
46	Staff Training			
47	Sub-Contractor (NCPHS)	\$ 71,053	\$ 72,061	\$ 143,114
48				
49	TOTAL DEVELOPER OPERATING EXPENSE	\$ 71,053	\$ 72,061	\$ 143,114
50				
51	TOTAL OPERATING EXPENSE	\$ 152,988	\$ 155,160	\$ 308,148
52				
53	HSA #3			

**APPENDIX A-1 – SERVICES TO BE PROVIDED
CHINATOWN COMMUNITY DEVELOPMENT CENTER**

**RAD Housing Support Services at 227 Bay Street
July 1, 2017 through June 30, 2019**

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that results in substantial functional limitations in one or more major life activity.
Grantee	Chinatown Community Development Center (Chinatown CDC)
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units at 227 Bay Street.

IV. Description of Services

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities
 - Build tenant base
 - Develop neighborhood partnerships

- 2) Community Building
 - Community organizing and events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities

- 3) Service Connection
 - Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will hire, train, and supervise 0.35 FTE (leveraged and/or grant funded) to provide services at 227 Bay Street during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.
- Staff will make efforts to contact all new tenants to invite them to make use of support services and inform them of community activities.
- Keep residents informed about the construction schedule as well as possible impacts to the amenities and pathways at the property

Health and Wellness:

- Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.

- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.
- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.

Housing Stability:

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.

Community Engagement:

- Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.
- Organize monthly resident and staff meetings

V. Location and Time of Services

Services will be provided at 227 Bay Street, Monday through Friday during regular office hours of 9 a.m. to 6 p.m., excluding holidays.

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.
- Grantee will communicate and collaborate regularly with DAAS to help provide logistical and operational support to the program and to provide quality services to tenants.

- Grantee will work collaboratively with DAAS to strategize program direction and services provision.
- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
- Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, and provide documentation that tracks demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

For grant period of July 1, 2017 through December 31, 2017:

- Grantee will have individual and group service encounters with at least 65% of the tenants per month.
- Grantee will provide to tenants a minimum of 26 activities or events semi-annually. At least six (6) of those activities or events semi-annually are an educational training, presentation, or workshop.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

For grant period of January 1, 2018 through June 30, 2019:

- Grantee will have individual and group service encounters with at least 65% unduplicated tenants per month.
- Grantee will provide to tenants a minimum of two (2) activities or events per week (or 104 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel “strongly” or “very strongly” about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: “How strongly do you feel about being connected and involved in the tenant/resident community at [site]? The options should be “Very strongly”, “Strongly”, “Somewhat”, “Not at all”.
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will “agree” or “highly agree” that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: “Do you have better access to services that improve your health and wellness?” The options should be “Highly agree”, “Agree”, “Neutral”, “Disagree”, “Highly disagree”.
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
 - Number and percentage of unduplicated tenants with individual and group service encounters.
 - Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.

- Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with “strongly” or “very strongly” when asked about being connected and involved in their tenant/resident community.
- Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with “agree” or “highly agree” when asked about having better access to services that improve their health and wellness.
- Number and percentage of households that have maintained or have obtained a stable housing.

C. Grantee will provide Ad Hoc reports as required by the Department.

D. For assistance with reporting requirements or submission of reports, contact:

Drake.Herrador@sfgov.org
 Contract Manager, Office of Contract Management
 Human Services Agency

or

Fanny.Lapitan@sfgov.org
 Program Analyst, Long Term Care Operations
 Department of Aging and Adult Services

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	F
1	Appendix B-1, Page 1			
2	Document Date: 4/20/2017			
3	HUMAN SERVICES AGENCY BUDGET SUMMARY			
4	BY PROGRAM			
5	Name			
6	Chinatown Community Development Center			
7	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification <input type="checkbox"/>			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	Program: Rental Assistance Housing Support Services - 227 Bay St.			TOTAL
10	Budget Reference Page No.(s)			
11	Program Term	7/1/17-6/30/18	7/1/18-6/30/19	7/1/17 - 6/30/19
12	Expenditures			
13	Salaries & Benefits	\$35,038	\$35,038	\$70,076
14	Operating Expense	\$9,154	\$9,154	\$18,308
15	Subtotal	\$44,192	\$44,192	\$88,384
16	Indirect Percentage (%)	13%	13%	13%
17	Indirect Cost (Line 16 X Line 15)	\$5,745	\$5,745	\$11,490
18	Capital Expenditure	\$0	\$0	\$0
19	Total Expenditures	\$49,937	\$49,937	\$99,874
20	HSA Revenues			
21	Local General Fund	\$49,937	\$49,937	\$99,874
22				
23				
24				
25				
26				
27				
28				
29	TOTAL HSA REVENUES	\$49,937	\$49,937	\$99,874
30	Other Revenues			
31				
32				
33				
34				
35				
36	Total Revenues	\$49,937	\$49,937	\$99,874
37	Full Time Equivalent (FTE)			
39	Prepared by: Joseph Fu	Telephone No.: 415-984-1487	Date: 4/20/2017	
40	HSA-CO Review Signature: _____			
41	HSA #1			11/15/2007

Program: Rental Assistance Housing Support Services - 227 Bay St.
 (Same as Line 9 on HSA #1)

Salaries & Benefits Detail

	A	B	C	D	E	F	G	J
1								
2								
3								
4	Program: Rental Assistance Housing Support Services - 227 Bay St.							
5	(Same as Line 9 on HSA #1)							
6								
7	Salaries & Benefits Detail							
8								
9								
10								
11		Agency Totals		For HSA Program		7/1/17-6/30/18	7/1/18-6/30/19	TOTAL
12	POSITION TITLE	Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	Budgeted Salary	Budgeted Salary	7/1/17 to 6/30/19
13	Resident Services Coordinator	\$53,913	100%	40.00%	40.00%	\$21,565	\$21,565	\$43,130
14	Resident Services Assistant	\$40,976	100%	5.00%	5.00%	\$2,049	\$2,049	\$4,098
15	Supervisor	\$58,604	100%	5.00%	5.00%	\$2,930	\$2,930	\$5,860
16								\$0
17								\$0
18								\$0
19								\$0
20								\$0
21								\$0
22								\$0
23								\$0
24								\$0
25								\$0
26								\$0
27								\$0
28								\$0
29								\$0
30	TOTALS		3.00	0.50	0.50	26,544	26,544	\$53,088
31								
32	FRINGE BENEFIT RATE	32.000%						
33	EMPLOYEE FRINGE BENEFITS					8,494	8,494	\$16,988
34								
35								
36	TOTAL SALARIES & BENEFITS	\$0				35,038	35,038	\$70,076
37	HSA #2	11/15/2007						

	A	B	C	D	E	F	G	H	L	M
1	Appendix B-1, Page 3									
2	Document Date: 4/20/2017									
3										
4	Program: Rental Assistance Housing Support Services - 227 Bay St.									
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>7/1/17-6/30/18</u>		<u>7/1/18-6/30/19</u>		<u>7/1/17 - 6/30/19</u>	
13	Rental of Property				\$1,000		\$1,000		\$ 2,000	
14	Utilities(Elec, Water, Gas, Phone, Scavenger)				\$600		\$600		\$ 1,200	
15	Office Supplies, Postage				\$500		\$500		\$ 1,000	
16	Building Maintenance Supplies and Repair									
17	Printing and Reproduction									
18	Insurance									
19	Staff Training									
20	Staff Travel-(Local & Out of Town)				\$250		\$250		\$ 500	
21	Rental of Equipment									
22	CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE									
23	Clinical Consultation Fees									
24										
25										
26										
27										
28	OTHER									
29	Job Posting Fees									
30	Dues/data management subscription									
31	Meeting expenses									
32	MIS expenses: computer servicing									
33	Janitorial									
34	Tenant Activities				\$6,804		\$6,804		\$ 13,608	
35										
36	TOTAL OPERATING EXPENSE				\$9,154		\$9,154		\$18,308	
37										
38	HSA #3								11/15/2007	

**APPENDIX A-2 – SERVICES TO BE PROVIDED
CHINATOWN COMMUNITY DEVELOPMENT CENTER**

**RAD Housing Support Services at 990 Pacific Avenue
July 1, 2017 through June 30, 2019**

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that results in substantial functional limitations in one or more major life activity.
Grantee	Chinatown Community Development Center (Chinatown CDC)
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units at 990 Pacific Avenue.

IV. Description of Services

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities
 - Build tenant base
 - Develop neighborhood partnerships

- 2) Community Building
 - Community organizing and events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities

- 3) Service Connection
 - Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will hire, train, and supervise 1.25 FTE (leveraged and/or grant funded) to provide services at 990 Pacific Avenue during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.
- Staff will make efforts to contact all new tenants to invite them to make use of support services and inform them of community activities.
- Keep residents informed about the construction schedule as well as possible impacts to the amenities and pathways at the property

Health and Wellness:

- Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.

- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.
- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.
- Coordinate off-site programming for residents to access during exterior construction period, prior to relocation

Housing Stability:

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.

Community Engagement:

- Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being
- Organize monthly resident and staff meetings

V. Location and Time of Services

Services will be provided at 990 Pacific Avenue, Monday through Friday during regular office hours of 9 a.m. to 6 p.m., excluding holidays.

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.

- Grantee will communicate and collaborate regularly with DAAS to help provide logistical and operational support to the program and to provide quality services to tenants.
- Grantee will work collaboratively with DAAS to strategize program direction and services provision.
- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
- Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, and provide documentation that tracks demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

For grant period of July 1, 2017 through December 31, 2017:

- Grantee will have individual and group service encounters with at least 65% of the tenants per month.
- Grantee will provide to tenants a minimum of 26 activities or events semi-annually. At least six (6) of those activities or events semi-annually are an educational training, presentation, or workshop.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

For grant period of January 1, 2018 through June 30, 2019:

- Grantee will have individual and group service encounters with at least 65% unduplicated tenants per month.
- Grantee will provide to tenants a minimum of two (2) activities or events per week (or 104 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel “strongly” or “very strongly” about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: “How strongly do you feel about being connected and involved in the tenant/resident community at [site]? The options should be “Very strongly”, “Strongly”, “Somewhat”, “Not at all”.
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will “agree” or “highly agree” that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: “Do you have better access to services that improve your health and wellness?” The options should be “Highly agree”, “Agree”, “Neutral”, “Disagree”, “Highly disagree”.
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
 - Number and percentage of unduplicated tenants with individual and group service encounters.
 - Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
 - Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with “strongly” or “very strongly” when

asked about being connected and involved in their tenant/resident community.

- Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with “agree” or “highly agree” when asked about having better access to services that improve their health and wellness.
- Number and percentage of households that have maintained or have obtained a stable housing.

C. Grantee will provide Ad Hoc reports as required by the Department.

D. For assistance with reporting requirements or submission of reports, contact:

Drake.Herrador@sfgov.org
Contract Manager, Office of Contract Management
Human Services Agency

or

Fanny.Lapitan@sfgov.org
Program Analyst, Long Term Care Operations
Department of Aging and Adult Services

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	F
1	Appendix B-2, Page 1			
2	Document Date: 4/20/2017			
3	HUMAN SERVICES AGENCY BUDGET SUMMARY			
4	BY PROGRAM			
5	Name			
6	Chinatown Community Development Center			
7	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification <input type="checkbox"/>			
8	If modification, Effective Date of Mod. No. of Mod.			
9	Program: Rental Assistance Housing Support Services - 990 Pacific Ave			TOTAL
10	Budget Reference Page No.(s)			
11	Program Term	7/1/17 - 6/30/18	7/1/18 - 6/30/19	7/1/17 - 6/30/19
12	Expenditures			
13	Salaries & Benefits	\$93,659	\$93,659	\$187,318
14	Operating Expense	\$27,911	\$27,911	\$55,822
15	Subtotal	\$121,570	\$121,570	\$243,140
16	Indirect Percentage (%)	13%	13%	13%
17	Indirect Cost (Line 16 X Line 15)	\$15,804	\$15,804	\$31,608
18	Capital Expenditure	\$0	\$0	\$0
19	Total Expenditures	\$137,374	\$137,374	\$274,748
20	HSA Revenues			
21	Local General Fund	\$137,374	\$137,374	\$274,748
22				
23				
24				
25				
26				
27				
28				
29	TOTAL HSA REVENUES	\$137,374	\$137,374	\$274,748
30	Other Revenues			
31				
32				
33				
34				
35				
36	Total Revenues	\$137,374	\$137,374	\$274,748
37	Full Time Equivalent (FTE)			
39	Prepared by: Joseph Fu	Telephone No.: 415-984-1487	Date: 4/20/2017	
40	HSA-CO Review Signature: _____			
41	HSA #1			11/15/2007

	A	B	C	D	E	F	G	H	L	M
1	Appendix B-2, Page 2									
2										
3										
4	Program: Rental Assistance Housing Support Services - 990 Pacific Ave									
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>7/1/17 - 6/30/18</u>		<u>7/1/18 - 6/30/19</u>		<u>7/1/17 - 6/30/19</u>	
13	Rental of Property				\$5,000		\$5,000		\$	10,000.00
14	Utilities(Elec, Water, Gas, Phone, Scavenger)				\$2,500		\$2,500		\$	5,000.00
15	Office Supplies, Postage				\$2,800		\$2,800		\$	5,600.00
16	Building Maintenance Supplies and Repair									
17	Printing and Reproduction				\$100		\$100		\$	200.00
18	Insurance									
19	Staff Training				\$1,000		\$1,000		\$	2,000.00
20	Staff Travel-(Local & Out of Town)				\$1,000		\$1,000		\$	2,000.00
21	Rental of Equipment				\$1,200		\$1,200		\$	2,400.00
22	CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE									
23	Professional Services for tenant relocation activitie				\$4,000				\$	4,000.00
24										
25										
26										
27										
28	OTHER									
29	Job Posting Fees									
30	Dues/data management subscription									
31	Meeting expenses				\$250		\$250		\$	500.00
32	MIS expenses: computer servicing									
33	Janitorial				\$900		\$900		\$	1,800.00
34	Tenant Activities				\$9,161		\$13,161		\$	22,322.00
35										
36	TOTAL OPERATING EXPENSE				\$27,911		\$27,911			\$55,822
37										
38	HSA #3									11/15/2007

**APPENDIX A-1 – SERVICES TO BE PROVIDED
COMMUNITY HOUSING PARTNERSHIP**

**RAD Housing Support Services at 1750 McAllister Street
July 1, 2017 through June 30, 2019**

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that results in substantial functional limitations in one or more major life activity.
Grantee	Community Housing Partnership
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted housing development units at 1750 McAllister Street.

IV. Description of Services

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities
 - Build tenant base
 - Develop neighborhood partnerships

- 2) Community Building
 - Facilitate community organizing and host events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase access to information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities

- 3) Service Connection
 - Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will hire, train, and supervise 1.2 FTE (leveraged and/or grant funded) to provide services at 1750 McAllister Street during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.
- Staff will make efforts to contact all new tenants to invite them to make use of support services and inform them of community activities.

Health and Wellness:

- Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.

- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.

Housing Stability:

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.

Community Engagement:

- Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.

V. Location and Time of Services

Services will be provided at 1750 McAllister Street, Monday through Friday, during regular office hours of 9 a.m. to 5 p.m., with potential variations due to scheduled evening or weekend hours, and excluding holidays.

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.
- Grantee will communicate and collaborate regularly with DAAS to help provide logistical and operational support to the program and to provide quality services to tenants.
- Grantee will work collaboratively with DAAS to strategize program direction and services provision.

- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
- Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, and provide documentation that tracks demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Grantee will have individual and group service encounters with at least 50% of the tenants per month.
- Grantee will provide to tenants a minimum of one (1) activity or event per week (or 52 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel “strongly” or “very strongly” about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: “How strongly do you feel about being connected and involved in the tenant/resident community at [site]? The options should be “Very strongly”, “Strongly”, “Somewhat”, “Not at all”.
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will “agree” or “highly agree” that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: “Do you have better access to services that improve your health and wellness?” The options should be “Highly agree”, “Agree”, “Neutral”, “Disagree”, “Highly disagree”.
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
- Number and percentage of unduplicated tenants with individual and group service encounters.
 - Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
- Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with “strongly” or “very strongly” when asked about being connected and involved in their tenant/resident community.
 - Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with “agree” or “highly agree” when asked about having better access to services that improve their health and wellness.
 - Number and percentage of households that have maintained or have obtained a stable housing.
- C. Grantee will provide Ad Hoc reports as required by the Department.
- D. For assistance with reporting requirements or submission of reports, contact:

Rocio.Duenas@sfgov.org
Contract Manager, Office of Contract Management
Human Services Agency

or

Fanny.Lapitan@sfgov.org
Program Analyst, Long Term Care Operations
Department of Aging and Adult Services

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.

- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	E
1	Appendix B-1, Page 1			
2	Document Date: 5/25/2017			
3	HUMAN SERVICES AGENCY BUDGET SUMMARY			
4	BY PROGRAM			
5	Name		Contract Term:	
6	Community Housing Partnership		6/1/2017 - 7/30/2019	
7	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification <input type="checkbox"/>			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	Program: Rental Assistance Demonstration - 1750 McAllister			
10	Budget Reference Page No.(s)			
11	Program Term		7/1/17-6/30/18	7/1/18-6/30/19
12	Expenditures			
13	Salaries & Benefits	\$49,777	\$49,777	\$99,554
14	Operating Expense	\$8,339	\$8,339	\$16,679
15	Subtotal	\$58,116	\$58,116	\$116,232
16	Indirect Percentage (%)	13%	13%	
17	Indirect Cost (Line 16 X Line 15)	\$7,555	\$7,555	\$15,110
18	Capital Expenditure	\$0	\$0	\$0
19	Total Expenditures	\$65,671	\$65,671	\$131,342
20	HSA Revenues			
21	Local General Fund	\$65,671	\$65,671	\$131,342
22				
23				
24				
25				
26				
27				
28				
29	TOTAL HSA REVENUES	\$65,671	\$65,671	\$131,342
30	Other Revenues			
31				
32				
33				
34				
35				
36	Total Revenues	\$65,671	\$65,671	\$131,342
37	Full Time Equivalent (FTE)			
38				
39	Prepared by: Kani Lin, Controller	Telephone No.: 415-852-5322	Date: 4/18/17	
40	HSA-CO Review Signature: _____			
41	HSA #1			5/25/2017

	A	B	C	D	E	F	G	J	K
1	Appendix B-1, Page 3								
2	Date: 5/25/17								
3									
4	Program Name:								
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>7/1/17-6/30/18</u>	<u>7/1/18-6/30/19</u>		<u>7/1/17-6/30/19</u>		
13	Rental of Property			\$ 130	\$ 130		\$ 261		
14	Utilities(Elec, Water, Gas, Phone, Scavenger)			\$ 1,537	\$ 1,537		\$ 3,073		
15	Office Supplies, Postage			\$ 809	\$ 809		\$ 1,619		
16	Building Maintenance Supplies and Repair			\$ 1,065	\$ 1,065		\$ 2,131		
17	Printing and Reproduction			\$ 745	\$ 745		\$ 1,490		
18	Insurance			\$ 155	\$ 155		\$ 310		
19	Staff Training			\$ 569	\$ 569		\$ 1,138		
20	Staff Travel-(Local & Out of Town)			\$ 150	\$ 150		\$ 300		
21	Rental of Equipment			\$ 1,840	\$ 1,840		\$ 3,679		
22	CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE								
23	Professional Service								
24									
25									
26									
27									
28	OTHER								
29	Payroll Expenses			\$ 159	\$ 159		\$ 319		
30	Audit/Accounting			\$ 127	\$ 127		\$ 254		
31	Office Equipment Repair (IT Support)			\$ 328	\$ 328		\$ 656		
32	Organizational Activities (staff)								
33	Tenant Projects/Activities			\$ 725	\$ 725		\$ 1,450		
34									
35	TOTAL OPERATING EXPENSE			\$ 8,339	\$ 8,339		\$ 16,679		
36									
37	HSA #3								10/25/2016

**APPENDIX A-2 – SERVICES TO BE PROVIDED
COMMUNITY HOUSING PARTNERSHIP**

**RAD Housing Support Services at 666 Ellis Street
July 1, 2017 through June 30, 2019**

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that results in substantial functional limitations in one or more major life activity.
Grantee	Community Housing Partnership
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units at 666 Ellis Street.

IV. Description of Services

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities
 - Build tenant base
 - Develop neighborhood partnerships

- 2) Community Building
 - Community organizing and events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities

- 3) Service Connection
 - Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will hire, train, and supervise 1.2 FTE (leveraged and/or grant funded) to provide services at 666 Ellis Street during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.
- Staff will make efforts to contact all new tenants to invite them to make use of support services and inform them of community activities.

Health and Wellness:

- Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.

- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.

Housing Stability:

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.

Community Engagement:

- Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.

V. Location and Time of Services

Services will be provided at 666 Ellis Street, Monday through Friday during regular office hours of 9 a.m. to 5 p.m., with potential variations due to scheduled evening or weekend hours, and excluding holidays.

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.
- Grantee will communicate and collaborate regularly with DAAS to help provide logistical and operational support to the program and to provide quality services to tenants.
- Grantee will work collaboratively with DAAS to strategize program direction and services provision.

- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
- Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, and provide documentation that tracks demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Grantee will have individual and group service encounters with at least 65% of the tenants per month.
- Grantee will provide to tenants a minimum of two (2) activities or events per week (or 104 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel “strongly” or “very strongly” about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: “How strongly do you feel about being connected and involved in the tenant/resident community at [site]? The options should be “Very strongly”, “Strongly”, “Somewhat”, “Not at all”.
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will “agree” or “highly agree” that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: “Do you have better access to services that improve your health and wellness?” The options should be “Highly agree”, “Agree”, “Neutral”, “Disagree”, “Highly disagree”.
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
- Number and percentage of unduplicated tenants with individual and group service encounters.
 - Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
- Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with “strongly” or “very strongly” when asked about being connected and involved in their tenant/resident community.
 - Number and percentage of unduplicated tenants who participated in the satisfaction survey and responded with “agree” or “highly agree” when asked about having better access to services that improve their health and wellness.
 - Number and percentage of households that have maintained or have obtained a stable housing.
- C. Grantee will provide Ad Hoc reports as required by the Department.
- D. For assistance with reporting requirements or submission of reports, contact:

Rocio.Duenas@sfgov.org
Contract Manager, Office of Contract Management
Human Services Agency

or

Fanny.Lapitan@sfgov.org
Program Analyst, Long Term Care Operations
Department of Aging and Adult Services

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.

- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	E
1	Appendix B-2, Page 1			
2	Document Date: 5/25/2017			
3	HUMAN SERVICES AGENCY BUDGET SUMMARY			
4	BY PROGRAM			
5	Name		Contract Term:	
6	Community Housing Partnership		7/1/2017 - 6/30/2019	
7	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification <input type="checkbox"/>			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	Program: 666 Ellis			
10	Budget Reference Page No.(s)			Total
11	Program Term		7/1/17-6/30/18	7/1/18-6/30/19
12	Expenditures			
13	Salaries & Benefits	\$ 48,725	\$ 48,725	\$ 97,450
14	Operating Expense	\$ 9,032	\$ 9,032	\$ 18,064
15	Subtotal	\$ 57,757	\$ 57,757	\$ 115,514
16	Indirect Percentage (%)	15%	15%	
17	Indirect Cost (Line 16 X Line 15)	\$ 8,664	\$ 8,664	\$ 17,328
18	Capital Expenditure	\$ -	\$ -	\$ -
19	Total Expenditures	\$ 66,421	\$ 66,421	\$ 132,842
20	HSA Revenues			
21	General Fund	\$ 66,421	\$ 66,421	\$ 132,842
22				
23				
24				
25				
26				
27				
28				
29	TOTAL HSA REVENUES	\$ 66,421	\$ 66,421	\$ 132,842
30	Other Revenues			
31				
32				
33				
34				
35				
36	Total Revenues	\$ 66,421	\$ 66,421	\$ 132,842
37	Full Time Equivalent (FTE)	0.75	75%	
38				
39	Prepared by: Kani Lin, Controller	Telephone No.: 415-852-5322	Date: 4/18/17	
40	HSA-CO Review Signature: _____			
41	HSA #1			5/25/2017

Program Name:
(Same as Line 9 on HSA #1)

Salaries & Benefits Detail

	A	B	C	D	E	F	G	I
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								
11						7/1/17-6/30/18	7/1/18-6/30/19	
12	POSITION TITLE	Agency Totals	HSA Program		DHS Program	DHS Program	TOTAL	
		Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	7/1/17 to 6/30/19
13	Resident Service Team Lead	\$ 48,220	1.00	25%	0.25	\$ 12,055	\$ 12,055	\$ 24,110
14	Clinical Case Manager	\$ 51,981	1.00	50%	0.50	\$ 25,991	\$ 25,991	\$ 51,981
15								
16								
17								
18								
19								
20								
21								
22								
23								
24								
25								
26								
27								
28								
29								
30	TOTALS		2.00	75%	0.75	\$ 38,046	\$ 38,046	\$ 76,091
31								
32	FRINGE BENEFIT RATE	28%						
33	EMPLOYEE FRINGE BENEFITS					\$ 10,680	\$ 10,680	\$ 21,359
34								
35								
36	TOTAL SALARIES & BENEFITS					\$ 48,725	\$ 48,725	\$ 97,450
37	HSA #2	5/25/2017						

	A	B	C	D	E	F	G	J	K
1	Appendix B-3, Page 3								
2	Date: 5/25/17								
3									
4	Program Name:								
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>7/1/17-6/30/18</u>		<u>7/1/18-6/30/19</u>		<u>7/1/17-6/30/19</u>
13	Rental of Property								
14	Utilities(Elec, Water, Gas, Phone, Scavenger)								
15	Office Supplies, Postage				\$ 2,463		\$ 2,463		\$ 4,926
16	Building Maintenance Supplies and Repair								
17	Printing and Reproduction								
18	Insurance				\$ 244		\$ 244		\$ 488
19	Staff Training								
20	Staff Travel-(Local & Out of Town)				\$ 250		\$ 250		\$ 500
21	Rental of Equipment								
22	CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE								
23									
24									
25									
26									
27	OTHER								
28	Payroll Expenses				\$ 386		\$ 386		\$ 772
29	Audit/Accounting				\$ 211		\$ 211		\$ 422
30	Office Equipment Repair (IT Support)								
31	IT & Small Office Purchase				\$ 795		\$ 795		\$ 1,590
32	Organizational Activities (staff)				\$ 183		\$ 183		\$ 366
33	Tenant Projects/Activities				\$ 4,500		\$ 4,500		\$ 9,000
34									
35	TOTAL OPERATING EXPENSE				\$ 9,032		\$ 9,032		\$ 18,064
36									
37	HSA #3								5/25/2017

**APPENDIX A – SERVICES TO BE PROVIDED
GLIDE COMMUNITY HOUSING**

**RAD Housing Support Services at 350 Ellis Street
July 1, 2017 to June 30, 2019**

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services, a division of the Human Services Agency
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that results in substantial functional limitations in one or more major life activity.
Grantee	Glide Community Housing
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units at 350 Ellis Street.

IV. Description of Services

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities

- Build tenant base
 - Develop neighborhood partnerships
- 2) Community Building
- Facilitate community organizing and host events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase access to information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities
- 3) Service Connection
- Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will hire, train, and supervise 1.25 FTE (leveraged and/or grant funded) to provide services at 350 Ellis Street during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.

Health and Wellness:

- Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.
- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.

Housing Stability:

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.

Community Engagement:

- Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.

V. Location and Time of Services

Services will be provided at 350 Ellis Street, Monday through Friday, during regular office hours of 9 a.m. to 5 p.m., excluding holidays. A designated staff person is also on call for after hours and weekend emergencies.

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.
- Grantee will communicate and collaborate regularly with DAAS to help provide logistical and operational support to the program and to provide quality services to tenants.
- Grantee will work collaboratively with DAAS to strategize program direction and services provision.
- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
- Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, and provide documentation that tracks demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Grantee will have individual and group service encounters with at least 50% of the tenants per month.
- Grantee will provide to tenants a minimum of one (1) activity or event per week (or 52 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel “strongly” or “very strongly” about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: “How strongly do you feel about being connected and involved in the tenant/resident community at [site]? The options should be “Very strongly”, “Strongly”, “Somewhat”, “Not at all”.
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will “agree” or “highly agree” that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: “Do you have better access to services that improve your health and wellness?” The options should be “Highly agree”, “Agree”, “Neutral”, “Disagree”, “Highly disagree”.
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII - Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.

- Number and percentage of unduplicated tenants with individual and group service encounters.
- Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
- Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.

B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII - Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.

- Number and percentage of tenants who have rated overall service as “Excellent” or “Good” in Tenant Satisfaction Survey, and number and percentage of response rate.
- Number and percentage of unduplicated tenants who were outreached to.
- Number and percentage of households that have maintained or have obtained stable housing.

C. Grantee will provide Ad Hoc reports as required by the Department.

D. For assistance with reporting requirements or submission of reports, contact:

Victoria.Chan@sfgov.org
Contract Manager, Office of Contract Management
Human Services Agency

or

Carrie.Wong@sfgov.org
Director, Long Term Care Operations
Department of Aging and Adult Services

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D
1	Appendix B, Page 1			
2	Document Date: 5/12/2017			
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY			
4	BY PROGRAM			
5	Contractor's Name		Contract Term	
6	Glide Community Housing		July 1, 2017-June 30, 2019	
7	(Check One) ___ New ___X___ Renewal ___ Modification			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	Program: 350 Ellis - Rental Assistance Demonstration			TOTAL
10	Budget Reference Page No.(s)			
11	Program Term		7/1/17 - 6/30/18	7/1/18 - 6/30/19
12	Human Services Agency Expenditures			
13	Salaries & Benefits	\$48,094	\$48,094	\$96,188
14	Operating Expense	\$9,801	\$9,801	\$19,602
15	Capital Expenditure	\$0	\$0	\$0
16	Subtotal	\$57,895	\$57,895	\$115,790
17	Indirect Percentage (%)	13%	13%	13%
18	Indirect Cost (Line 16 X Line 17)	\$7,526	\$7,526	\$15,052
19	Total HSA Expenditures	\$65,421	\$65,421	\$130,842
20	Developer Match Expenditures			
21	Salaries & Benefits	\$69,016	\$69,016	\$138,032
22	Operating Expense	\$2,666	\$2,666	\$5,332
23	Capital Expenditure	\$0	\$0	\$0
24	Subtotal	\$71,682	\$71,682	\$143,364
25	Indirect Percentage (%)	13%	13%	13%
26	Indirect Cost (Line 16 X Line 17)	\$9,318	\$9,318	\$18,636
27	Total Developer Expenditures	\$81,000	\$81,000	\$162,000
28				
29	Total HSA and Developer Expenditures	\$146,421	\$146,421	\$292,842
30	HSA Revenues			
31	Local General Fund	\$65,421	\$65,421	\$130,842
32				
33				
34				
35				
36				
37				
38				
39	TOTAL HSA REVENUES	\$65,421	\$65,421	\$130,842
40	Developer Revenues			
41	Developer Match Funds	\$81,000	\$81,000	\$162,000
42				
43				
44				
45	Total Developer Revenues	\$81,000	\$81,000	\$162,000
46	Total Revenues	\$146,421	\$146,421	\$292,842
47	Full Time Equivalent (FTE)	1.75	1.75	
49	Prepared by: Pamela Grayson-Holmon		Telephone No. 415-674-6107	
50	HSA-CO Review Signature: _____			
51	HSA #1			
52				

	A	B	C	D	E	F
1	Appendix B, Page 2					
2	Document Date: 5/12/2017					
3						
4	Contractor's Name: Glide Community Housing - 350 Ellis (RAD)					
5						
6						
7	Salaries & Benefits Detail					
8						
9						
10			Human Services Agency		Human Services Agency	
11		TERM	7/1/17 - 6/30/18		7/1/18 - 6/30/19	
12	POSITION TITLE		FTE	SALARIES	FTE	SALARIES
13	Support Services Case Manager- Lead		0.30	\$15,151	0.30	\$15,151
14	Executive Director		0.05	5,674	0.05	5,674
15	Operations Manager		0.05	3,467	0.05	3,467
16	Case Manager (Spanish Speaker)		0.10	2,185	0.10	2,185
17	Admin Asst		0.30	9,728	0.30	9,728
18	Project Manager		0.05	1,664	0.05	1,664
19						
20						
21						
22						
23	TOTALS		0.85	\$37,869	0.85	\$37,869
24						
25						
26	EMPLOYEE FRINGE BENEFITS		27%	\$10,225	27%	\$10,225
27						
28						
29	TOTAL HSA SALARIES & BENEFITS			\$48,094		\$48,094
30						
31	DEVELOPER MATCH POSITION TITLE					
32	Support Services Case Manager Lead		0.50	\$25,251	0.50	\$25,251
33	Clinical Director/Supervisor		0.20	\$14,988	0.20	\$14,988
34	Project Manager		0.05	\$1,664	0.05	\$1,664
35	Executive Director		0.10	\$11,347	0.10	\$11,347
36	Case Manager		0.05	\$1,093	0.05	\$1,093
37						
38	TOTALS		0.90	\$54,343	0.90	\$54,343
39						
40	EMPLOYEE FRINGE BENEFITS		27%	\$14,673	27%	\$14,673
41						
42	TOTAL DEVELOPER SALARIES & BENEFITS			\$69,016		\$69,016
43						
44	TOTAL SALARIES & BENEFITS		1.75	\$117,110	1.75	\$117,110
45						
46	HSA #2					
47						

Contractor's Name: Glide Community Housing - 350 Ellis (RAD)
 (Same as Line 6 on HSA #1)

Indirect Cost Detail

1. Salaries and Benefits	TERM	Human Services Agency		Human Services Agency		TOTAL	
		7/1/17 - 6/30/18	7/1/18 - 6/30/19	7/1/18 - 6/30/19	SALARIES		
Position Title		FTE	SALARIES	FTE	SALARIES	FTE	SALARIES
EMPLOYEE FRINGE BENEFITS		%		%			
TOTAL SALARIES & BENEFITS							

2. Operating Cost - HSA

Expenditure Category	7/1/17 - 6/30/18	7/1/18 - 6/30/19	TOTAL
HSA Indirect Cost			
Back Office Support (ADP Total Source)	\$3,500	\$3,500	\$7,000
Audit	\$2,000	\$2,000	\$4,000
Insurance/accounting support	\$2,026	\$2,026	\$4,052
Total HSA Indirect Cost	\$7,526	\$7,526	\$15,052
Developer Indirect Cost			
ADP Total Source	\$3,500	\$3,500	\$7,000
Audit	\$2,500	\$2,500	\$5,000
Insurance/Accounting Support	\$2,400	\$2,400	\$4,800
Furniture, fixtures, and office set-up supplies	\$918	\$918	\$1,836
Total Developer Indirect Cost	\$9,318	\$9,318	\$18,636
TOTAL OPERATING INDIRECT COST	\$16,844	\$16,844	\$33,688

HSA# 5

**APPENDIX A-1 – SERVICES TO BE PROVIDED
MERCY HOUSING CALIFORNIA**

**RAD Housing Support Services at 345 Arguello Boulevard
July 1, 2017 to June 30, 2019**

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services, a division of the Human Services Agency
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that results in substantial functional limitations in one or more major life activity.
Grantee	Mercy Housing
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units at 345 Arguello Boulevard.

IV. Description of Services

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities

- Build tenant base
 - Develop neighborhood partnerships
- 2) Community Building
- Community organizing and events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities
- 3) Service Connection
- Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will hire, train, and supervise 1 FTE (leveraged and/or grant funded) to provide services at 345 Arguello Boulevard during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.

Health and Wellness:

- Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.
- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.

Housing Stability:

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.

Community Engagement:

- Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.

V. Location and Time of Services

Services will be provided at 345 Arguello Boulevard, Monday through Friday during regular office hours of 9 a.m. to 5 p.m., excluding holidays.

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.
- Grantee will communicate and collaborate regularly with DAAS to help provide logistical and operational support to the program and to provide quality services to tenants.
- Grantee will work collaboratively with DAAS to strategize program direction and services provision.
- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
- Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, and provide documentation that tracks demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Grantee will have individual and group service encounters with at least 65% of the tenants per month.
- Grantee will provide to tenants a minimum of two (2) activities or events per week (or 104 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel “strongly” or “very strongly” about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: “How strongly do you feel about being connected and involved in the tenant/resident community at [site]? The options should be “Very strongly”, “Strongly”, “Somewhat”, “Not at all”.
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will “agree” or “highly agree” that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: “Do you have better access to services that improve your health and wellness?” The options should be “Highly agree”, “Agree”, “Neutral”, “Disagree”, “Highly disagree”.
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII - Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
 - Number and percentage of unduplicated tenants with individual and group service encounters.
 - Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII - Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
 - Number and percentage of tenants who have rated overall service as “Excellent” or “Good” in Tenant Satisfaction Survey, and number and percentage of response rate.
 - Number and percentage of unduplicated tenants who were outreached to.
 - Number and percentage of households that have maintained or have obtained stable housing.
- C. Grantee will provide Ad Hoc reports as required by the Department.

D. For assistance with reporting requirements or submission of reports, contact:

Victoria.Chan@sfgov.org
Contract Manager, Office of Contract Management
Human Services Agency

or

Carrie.Wong@sfgov.org
Director, Long Term Care Operations
Department of Aging and Adult Services

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D
1	Appendix B-1, Page 1			
2	Document Date: 4/25/2017			
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY			
4	BY PROGRAM			
5	Contractor's Name		Contract Term	
6	Mercy Housing: 345 Arguello		July 1, 2017-June 30, 2019	
7	(Check One) ___ New <u>X</u> Renewal ___ Modification ___			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	Program: Rental Assistance Demonstration			TOTAL
10	Budget Reference Page No.(s)			
11	Program Term	7/1/17-6/30/18	7/1/18-6/30/19	7/1/17-6/30/19
12	Human Services Agency Expenditures			
13	Salaries & Benefits	\$0	\$0	\$0
14	Operating Expense	\$30,254	\$30,254	\$60,508
15	Capital Expenditure	\$0	\$0	\$0
16	Subtotal	\$30,254	\$30,254	\$60,508
17	Indirect Percentage (%)	13%	13%	13%
18	Indirect Cost (Line 16 X Line 17)	\$3,933	\$3,933	\$7,866
19	Total HSA Expenditures	\$34,187	\$34,187	\$68,374
20	Developer Match Expenditures			
21	Salaries & Benefits	\$81,000	\$81,000	\$162,000
22	Operating Expense	\$0	\$0	\$0
23	Capital Expenditure	\$0	\$0	\$0
24	Total Developer Expenditures	\$81,000	\$81,000	\$162,000
25				
26	Total HSA and Developer Expenditures	\$115,187	\$115,187	\$230,374
27	HSA Revenues			
28	Local General Fund	\$34,187	\$34,187	\$68,374
29				
30				
31				
32				
33				
34				
35				
36	TOTAL HSA REVENUES	\$34,187	\$34,187	\$68,374
37	Developer Revenues			
38	Developer Match Funds	\$81,000	\$81,000	\$162,000
39				
40				
41				
42	Total Developer Revenues	\$81,000	\$81,000	\$162,000
43				
44	Total Revenues	\$115,187	\$115,187	\$230,374
45	Full Time Equivalent (FTE)	2.50	2.50	
47	Prepared by: Samantha Hogg	Telephone No.		
48	HSA-CO Review Signature:	_____		
49	HSA #1			
50				

	A	B	C	D	E	F
1	Appendix B-1, Page 2					
2	Document Date: 4/25/2017					
3						
4	Mercy Housing: 345 Arguello					
5						
6						
7	Salaries & Benefits Detail					
8						
9						
10			Human Services Agency		Human Services Agency	
11		TERM	7/1/17-6/30/18		7/1/18-6/30/19	
12	POSITION TITLE		FTE	SALARIES	FTE	SALARIES
13						
14						
15						
16						
17						
18						
19						
20						
21						
22						
23	TOTALS					
24						
25						
26	EMPLOYEE FRINGE BENEFITS					
27						
28						
29	TOTAL HSA SALARIES & BENEFITS		\$0		\$0	\$0
30						
31	DEVELOPER MATCH POSITION TITLE					
32	Resident Services		1.00	\$63,281	1.00	\$63,281
33						
34						
35						
36						
37						
38	TOTALS		1.00	\$63,281	1.00	\$63,281
39						
40	EMPLOYEE FRINGE BENEFITS		28%	\$17,719	28%	\$17,719
41						
42	TOTAL DEVELOPER SALARIES & BENEFITS			\$81,000		\$81,000
43	TOTAL SALARIES & BENEFITS		1.00	\$81,000	1.00	\$81,000
44						
45	HSA #2					
46						

Mercy Housing: 345 Arguello
 (Same as Line 6 on HSA #1)

Indirect Cost Detail

1. Salaries and Benefits	TERM	Human Services Agency		Human Services Agency		TOTAL
		FTE	7/1/17-6/30/18	FTE	7/1/18-6/30/19	
Position Title			SALARIES		SALARIES	SALARIES
EMPLOYEE FRINGE BENEFITS		%		%		
TOTAL SALARIES & BENEFITS						
2. Operating Cost						
<u>Expenditure Category</u>						
Q/A Fee i.e Contract Administrator etc.			\$3,933		\$3,933	\$7,866
TOTAL OPERATING COST			\$3,933		\$3,933	\$7,866
TOTAL INDIRECT COST (Salaries & Benefits + Operating Cost)			\$3,933		\$3,933	\$7,866

HSA# 5

**APPENDIX A-2 – SERVICES TO BE PROVIDED
MERCY HOUSING CALIFORNIA**

**RAD Housing Support Services at 491 31st Avenue
July 1, 2017 to June 30, 2019**

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services, a division of the Human Services Agency
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that results in substantial functional limitations in one or more major life activity.
Grantee	Mercy Housing
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units at 491-31st Avenue.

IV. Description of Services

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities

- Build tenant base
 - Develop neighborhood partnerships
- 2) Community Building
- Community organizing and events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities
- 3) Service Connection
- Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will hire, train, and supervise 1 FTE (leveraged and/or grant funded) to provide services at 491-31st Avenue during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.

Health and Wellness:

- Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.
- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.

Housing Stability:

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.

Community Engagement:

- Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.

V. Location and Time of Services

Services will be provided at 491-31st Avenue, Monday through Friday during regular office hours of 9 a.m. to 5p.m., excluding holidays.

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.
- Grantee will communicate and collaborate regularly with DAAS to help provide logistical and operational support to the program and to provide quality services to tenants.
- Grantee will work collaboratively with DAAS to strategize program direction and services provision.
- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
- Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, and provide documentation that tracks demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Grantee will have individual and group service encounters with at least 65% of the tenants per month.
- Grantee will provide to tenants a minimum of two (2) activities or events per week (or 104 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel “strongly” or “very strongly” about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: “How strongly do you feel about being connected and involved in the tenant/resident community at [site]? The options should be “Very strongly”, “Strongly”, “Somewhat”, “Not at all”.
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will “agree” or “highly agree” that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: “Do you have better access to services that improve your health and wellness?” The options should be “Highly agree”, “Agree”, “Neutral”, “Disagree”, “Highly disagree”.
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII - Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
 - Number and percentage of unduplicated tenants with individual and group service encounters.
 - Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII - Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
 - Number and percentage of tenants who have rated overall service as “Excellent” or “Good” in Tenant Satisfaction Survey, and number and percentage of response rate.
 - Number and percentage of unduplicated tenants who were outreached to.
 - Number and percentage of households that have maintained or have obtained stable housing.
- C. Grantee will provide Ad Hoc reports as required by the Department.
- D. For assistance with reporting requirements or submission of reports, contact:

Victoria.Chan@sfgov.org
Contract Manager, Office of Contract Management
Human Services Agency

or

Carrie.Wong@sfgov.org
Director, Long Term Care Operations
Department of Aging and Adult Services

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.

- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D
1	Appendix B-2, Page 1			
2	Document Date: 4/25/2017			
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY			
4				
5	Contractor's Name		Contract Term	
6	Mercy Housing : 31st Avenue		July 1, 2017 - June 30, 2019	
7	(Check One) ___ New <input checked="" type="checkbox"/> Renewal ___ Modification			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	Program: Rental Assistance Demonstration			TOTAL
10	Budget Reference Page No.(s)			
11	Program Term	7/1/17-6/30/18	7/1/18-6/30/19	7/1/17-6/30/19
12	Human Services Agency Expenditures			
13	Salaries & Benefits	\$0	\$0	\$0
14	Operating Expense	\$31,581	\$31,581	\$63,162
15	Capital Expenditure	\$0	\$0	\$0
16	Subtotal	\$31,581	\$31,581	\$63,162
17	Indirect Percentage (%)	13%	13%	13%
18	Indirect Cost (Line 16 X Line 17)	\$4,106	\$4,106	\$8,212
19	Total HSA Expenditures	\$35,687	\$35,687	\$71,374
20	Developer Match Expenditures			
21	Salaries & Benefits	\$81,000	\$81,000	\$162,000
22	Operating Expense	\$0	\$0	\$0
23	Capital Expenditure	\$0	\$0	\$0
24	Total Developer Expenditures	\$81,000	\$81,000	\$162,000
25				
26	Total HSA and Developer Expenditures	\$116,687	\$116,687	\$233,374
27	HSA Revenues			
28	Local General Fund	\$35,687	\$35,687	\$71,374
29				
30				
31				
32				
33				
34	TOTAL HSA REVENUES	\$35,687	\$35,687	\$71,374
35	Developer Revenues			
36	Developer Match Funds	\$81,000	\$81,000	\$162,000
37				
38				
39				
40	Total Developer Revenues	\$81,000	\$81,000	\$162,000
41	Total Revenues	\$116,687	\$116,687	\$233,374
42	Full Time Equivalent (FTE)	1.00	1.00	
44	Prepared by: Samantha Hogg		Telephone No. (415) 355-7120	
45	HSA-CO Review Signature: _____			
46	HSA #1			
47				

	A	B	C	D	E	F
1	Appendix B-2, Page 2					
2	Document Date: 4/25/2017					
3						
4	Mercy Housing : 31st Avenue					
5						
6						
7	Salaries & Benefits Detail					
8						
9						
10			Human Services Agency		Human Services Agency	
11			7/1/17-6/30/18		7/1/18-6/30/19	
12	POSITION TITLE	TERM	FTE	SALARIES	FTE	SALARIES
13	Resident Services Coordinator					
14						
15						
16						
17						
18						
19						
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21						
22						
23	TOTALS					
24						
25						
26	EMPLOYEE FRINGE BENEFITS					
27						
28						
29	TOTAL HSA SALARIES & BENEFITS		\$0		\$0	\$0
30						
31	DEVELOPER MATCH					
32	POSITION TITLE					
33	Resident Services Coordinator		1.00	\$63,281	1.00	\$63,281
34						
35						
36						
37						
38						
39	TOTALS		1.00	\$63,281	1.00	\$63,281
40						
41	EMPLOYEE FRINGE BENEFITS		28%	\$17,719	28%	\$17,719
42						
43	TOTAL DEVELOPER SALARIES & BENEFITS			\$81,000		\$81,000
44	TOTAL SALARIES & BENEFITS		1.00	\$81,000	1.00	\$81,000
45						
46	HSA #2					
47						

	A	B	C	D	E	F	G	H	I
1									
2									
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4	Mercy Housing : 31st Avenue								
5									
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9									
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Operating Expense Detail

	Human Services Agency	Human Services Agency	TOTAL
	7/1/17-6/30/18	7/1/18-6/30/19	7/1/17-6/30/19

HSA Expenditure Category	TERM	Human Services Agency	Human Services Agency	TOTAL
		7/1/17-6/30/18	7/1/18-6/30/19	7/1/17-6/30/19
Rental of Property				
Telephone				
Office Supplies, Postage		1,751	1,751	3,502
Maintenance Supplies and Repair				
Printing and Reproduction				
Insurance				
Staff Travel (local) & Training		1,500	1,500	3,000
Law Library				
Membership/Dues				
Rental of Equipment				
Senior Right Bulletin				
OTHER				
Supplies for Monthly Community Projects & Events. (li		18,750	18,750	37,500
Supervision		9,580	9,580	19,160
TOTAL HSA OPERATING EXPENSE		\$31,581	\$31,581	\$63,162

Developer Match Operating Expense				
Rental of Property				
Telephone				
Office Supplies, Postage				
Printing and Reproduction				
Insurance				
Law Library				
Membership/Dues				
Rental of Equipment				
Volunteer Expenses (Receptionist/intake)				
Client Costs				
Maintenance Supplies and Repair				
Utilities				
Janitorial service & supplies				
TOTAL DEVELOPER OPERATING EXPENSE		\$0	\$0	\$0
TOTAL OPERATING EXPENSE		\$31,581	\$31,581	\$63,162

HSA #3

Mercy Housing : 31st Avenue
 (Same as Line 6 on HSA #1)

Indirect Cost Detail

1. Salaries and Benefits	TERM	Human Services Agency		Human Services Agency		TOTAL
		FTE	7/1/17-6/30/18 SALARIES	FTE	7/1/18-6/30/19 SALARIES	7/1/17-6/30/19 SALARIES
Position Title						
EMPLOYEE FRINGE BENEFITS		%		%		
TOTAL SALARIES & BENEFITS						
2. Operating Cost						
<u>Expenditure Category</u>						
Q/A Fee i.e Contract Administrator, etc.			\$4,106		\$4,106	\$8,212
TOTAL OPERATING COST			\$4,106		\$4,106	\$8,212
TOTAL INDIRECT COST (Salaries & Benefits + Operating Cost)			\$4,106		\$4,106	\$8,212

HSA# 5

**APPENDIX A-3 – SERVICES TO BE PROVIDED
MERCY HOUSING CALIFORNIA**

**RAD Housing Support Services at 1880 Pine Street
July 1, 2017 to June 30, 2019**

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services, a division of the Human Services Agency
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that results in substantial functional limitations in one or more major life activity.
Grantee	Mercy Housing
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units at 1880 Pine Street.

IV. Description of Services

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities

- Build tenant base
 - Develop neighborhood partnerships
- 2) Community Building
- Community organizing and events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities
- 3) Service Connection
- Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will hire, train, and supervise 1.5 FTE (leveraged and/or grant funded) to provide services at 1880 Pine Street during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.

Health and Wellness:

- Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.
- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.

Housing Stability:

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.

Community Engagement:

- Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.

V. Location and Time of Services

Services will be provided at 1880 Pine Street, Monday through Friday during regular office hours of 9 a.m. to 5p.m., excluding holidays.

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.
- Grantee will communicate and collaborate regularly with DAAS to help provide logistical and operational support to the program and to provide quality services to tenants.
- Grantee will work collaboratively with DAAS to strategize program direction and services provision.
- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
- Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, and provide documentation that tracks demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Grantee will have individual and group service encounters with at least 65% of the tenants per month.
- Grantee will provide to tenants a minimum of two (2) activities or events per week (or 104 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel “strongly” or “very strongly” about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: “How strongly do you feel about being connected and involved in the tenant/resident community at [site]”? The options should be “Very strongly”, “Strongly”, “Somewhat”, “Not at all”.
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will “agree” or “highly agree” that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: “Do you have better access to services that improve your health and wellness?” The options should be “Highly agree”, “Agree”, “Neutral”, “Disagree”, “Highly disagree”.
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII - Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
 - Number and percentage of unduplicated tenants with individual and group service encounters.
 - Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII - Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
 - Number and percentage of tenants who have rated overall service as “Excellent” or “Good” in Tenant Satisfaction Survey, and number and percentage of response rate.
 - Number and percentage of unduplicated tenants who were outreached to.
 - Number and percentage of households that have maintained or have obtained a stable housing.
- C. Grantee will provide Ad Hoc reports as required by the Department.
- D. For assistance with reporting requirements or submission of reports, contact:

Victoria.Chan@sfgov.org
Contract Manager, Office of Contract Management
Human Services Agency

or

Carrie.Wong@sfgov.org
Director, Long Term Care Operations
Department of Aging and Adult Services

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D
1	Appendix B-3, Page 1			
2	Document Date: 04/25/2017			
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY			
4	BY PROGRAM			
5	Contractor's Name		Contract Term	
6	Mercy Housing 1880 Pine Street		July 1, 2017 -June 30, 2019	
7	(Check One) ___ New <u>X</u> Renewal ___ Modification			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	Program: Rental Assistance Demonstration			TOTAL
10	Budget Reference Page No.(s)			
11	Program Term	07/1/17-6/30/18	7/1/18-6/30/19	07/1/17-6/30/19
12	Human Services Agency Expenditures			
13	Salaries & Benefits	\$40,500	\$40,500	\$81,000
14	Operating Expense	\$42,824	\$42,824	\$85,648
15	Capital Expenditure	\$0	\$0	\$0
16	Subtotal	\$83,324	\$83,324	\$166,648
17	Indirect Percentage (%)	13%	13%	13%
18	Indirect Cost (Line 16 X Line 17)	\$10,832	\$10,832	\$21,664
19	Total HSA Expenditures	\$94,156	\$94,156	\$188,312
20	Developer Match Expenditures			
21	Salaries & Benefits	\$81,000	\$81,000	\$162,000
22	Operating Expense	\$0	\$0	\$0
23	Capital Expenditure	\$0	\$0	\$0
24	Total Developer Expenditures	\$81,000	\$81,000	\$162,000
25				
26	Total HSA and Developer Expenditures	\$175,156	\$175,156	\$350,312
27	HSA Revenues			
28	Local General Fund	\$94,156	\$94,156	\$188,312
29				
30				
31				
32				
33				
34				
35				
36	TOTAL HSA REVENUES	\$94,156	\$94,156	\$188,312
37	Developer Revenues			
38	Developer Match Funds	\$81,000	\$81,000	\$162,000
39				
40				
41				
42	Total Developer Revenues	\$81,000	\$81,000	\$162,000
43	Total Revenues	\$175,156	\$175,156	\$350,312
44	Full Time Equivalent (FTE)	1.50	1.50	
46	Prepared by: Samantha Hogg		Telephone No. (415) 355.7120	
47	HSA-CO Review Signature: _____			
48	HSA #1			
49				

	A	B	C	D	E	F
1	Appendix B-3, Page 2					
2	Document Date: 04/25/2017					
3						
4	Mercy Housing 1880 Pine Street					
5						
6						
7	Salaries & Benefits Detail					
8						
9						
10			Human Services Agency		Human Services Agency	
11		TERM	07/1/17-6/30/18		7/1/18-6/30/19	
12	POSITION TITLE		FTE	SALARIES	FTE	SALARIES
13	Resident Services Coordinator		0.50	\$31,640	0.50	\$31,640
14						
15						
16						
17						
18						
19						
20						
21						
22						
23	TOTALS		0.50	\$31,640	0.50	\$31,640
24						
25						
26	EMPLOYEE FRINGE BENEFITS		28%	\$8,860	28%	\$8,860
27						
28						
29	TOTAL HSA SALARIES & BENEFITS			\$40,500		\$40,500
30						
31	DEVELOPER MATCH POSITION TITLE					
32	Resident Services Coordinador		1.00	\$63,281	1.00	\$63,281
33						
34						
35						
36						
37						
38	TOTALS		1.00	\$63,821	1.00	\$63,281
39						
40	EMPLOYEE FRINGE BENEFITS		28%	\$17,719	28%	\$17,719
41						
42	TOTAL DEVELOPER SALARIES & BENEFITS			\$81,000		\$81,000
43	TOTAL SALARIES & BENEFITS		1.50	\$121,500	1.50	\$121,500
44						
45	HSA #2					
46						

**APPENDIX A-4 – SERVICES TO BE PROVIDED
MERCY HOUSING CALIFORNIA**

**RAD Housing Support Services at 1760 Bush Street
July 1, 2017 to June 30, 2019**

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services, a division of the Human Services Agency
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that results in substantial functional limitations in one or more major life activity.
Grantee	Mercy Housing
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted housing development units at 1760 Bush Street.

IV. Description of Services

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities

- Build tenant base
 - Develop neighborhood partnerships
- 2) Community Building
- Facilitate community organizing and host events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase access to information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities
- 3) Service Connection
- Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will hire, train, and supervise 1.50 FTE (leveraged and/or grant funded) to provide services at 1760 Bush Street during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.

Health and Wellness:

- Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.
- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.

Housing Stability:

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.

Community Engagement:

- Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.

V. Location and Time of Services

Services will be provided at 1760 Bush Street, Monday through Friday, during regular office hours of 9 a.m. to 5 p.m., excluding holidays.

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.
- Grantee will communicate and collaborate regularly with DAAS to help provide logistical and operational support to the program and to provide quality services to tenants.
- Grantee will work collaboratively with DAAS to strategize program direction and services provision.
- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
- Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, and provide documentation that tracks demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Grantee will have individual and group service encounters with at least 50% of the tenants per month.
- Grantee will provide to tenants a minimum of one (1) activity or event per week (or 52 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel “strongly” or “very strongly” about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: “How strongly do you feel about being connected and involved in the tenant/resident community at [site]? The options should be “Very strongly”, “Strongly”, “Somewhat”, “Not at all”.
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will “agree” or “highly agree” that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: “Do you have better access to services that improve your health and wellness?” The options should be “Highly agree”, “Agree”, “Neutral”, “Disagree”, “Highly disagree”.
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII - Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
 - Number and percentage of unduplicated tenants with individual and group service encounters.
 - Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII - Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
 - Number and percentage of tenants who have rated overall service as “Excellent” or “Good” in Tenant Satisfaction Survey, and number and percentage of response rate.
 - Number and percentage of unduplicated tenants who were outreached to.
 - Number and percentage of households that have maintained or have obtained stable housing.
- C. Grantee will provide Ad Hoc reports as required by the Department.
- D. For assistance with reporting requirements or submission of reports, contact:

Victoria.Chan@sfgov.org
Contract Manager, Office of Contract Management
Human Services Agency

or

Carrie.Wong@sfgov.org
Director, Long Term Care Operations
Department of Aging and Adult Services

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.

- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D
1	Appendix B-4, Page 1			
2	Document Date: 04/25/2017			
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY			
4				
5	Contractor's Name		Contract Term	
6	Mercy Housing : 1760 Bush Street		July 1, 2017 -June 30, 2019	
7	(Check One) ___ New <u>X</u> Renewal ___ Modification			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	Program: Rental Assistance Demonstration			TOTAL
10	Budget Reference Page No.(s)			
11	Program Term	7/1/17-6/30/18	7/1/18-6/30/19	7/1/17-6/30/19
12	Human Services Agency Expenditures			
13	Salaries & Benefits	\$40,500	\$40,500	\$81,000
14	Operating Expense	\$41,718	\$41,718	\$83,436
15	Capital Expenditure	\$0	\$0	\$0
16	Subtotal	\$82,218	\$82,218	\$164,436
17	Indirect Percentage (%)	13%	13%	13%
18	Indirect Cost (Line 16 X Line 17)	\$10,688	\$10,688	\$21,376
19	Total HSA Expenditures	\$92,906	\$92,906	\$185,812
20	Developer Match Expenditures			
21	Salaries & Benefits	\$81,000	\$81,000	\$162,000
22	Operating Expense	\$0	\$0	\$0
23	Capital Expenditure	\$0	\$0	\$0
24	Total Developer Expenditures	\$81,000	\$81,000	\$162,000
25				
26	Total HSA and Developer Expenditures	\$173,906	\$173,906	\$347,812
27	HSA Revenues			
28	Local General Fund	\$92,906	\$92,906	\$185,812
29				
30				
31				
32				
33				
34	TOTAL HSA REVENUES	\$92,906	\$92,906	\$185,812
35	Developer Revenues			
36	Developer Match Funds	\$81,000	\$81,000	\$162,000
37				
38				
39				
40	Total Developer Revenues	\$81,000	\$81,000	\$162,000
41	Total Revenues	\$173,906	\$173,906	\$347,812
42	Full Time Equivalent (FTE)	1.50	1.50	
44	Prepared by: Samantha Hogg		Telephone No. (415) 355-7120	
45	HSA-CO Review Signature: _____			
46	HSA #1			
47				

	A	B	C	D	E	F
1	Appendix B-4, Page 2					
2	Document Date: 04/25/2017					
3						
4	Mercy Housing : 1760 Bush Street					
5						
6						
7	Salaries & Benefits Detail					
8						
9						
10			Human Services Agency		Human Services Agency	
11		TERM	7/1/17-6/30/18		7/1/18-6/30/19	
12	POSITION TITLE		FTE	SALARIES	FTE	SALARIES
13	Resident Services Coordinator		0.50	\$31,640	0.50	\$31,640
14						
15						
16						
17						
18						
19						
20						
21						
22						
23	TOTALS		0.50	\$31,640	0.50	\$31,640
24						
25						
26	EMPLOYEE FRINGE BENEFITS		28%	\$8,860	28%	\$8,860
27						
28						
29	TOTAL HSA SALARIES & BENEFITS			\$40,500		\$40,500
30						
31	DEVELOPER MATCH POSITION TITLE					
32	Resident Services Coordinador		1.00	\$63,281	1.00	\$63,281
33						
34						
35						
36						
37						
38	TOTALS		1.00	\$63,281	1.00	\$63,281
39						
40	EMPLOYEE FRINGE BENEFITS		28%	\$17,719	28%	\$17,719
41						
42	TOTAL DEVELOPER SALARIES & BENEFITS			\$81,000		\$81,000
43	TOTAL SALARIES & BENEFITS		1.50	\$121,500	1.50	\$121,500
44						
45	HSA #2					
46						

Mercy Housing : 1760 Bush Street
 (Same as Line 6 on HSA #1)

Indirect Cost Detail

1. Salaries and Benefits	TERM	Human Services Agency		Human Services Agency		TOTAL
		7/1/17-6/30/18	7/1/18-6/30/19	7/1/18-6/30/19	7/1/17-6/30/19	
Position Title	FTE	SALARIES	FTE	SALARIES	FTE	SALARIES
EMPLOYEE FRINGE BENEFITS	%		%			
TOTAL SALARIES & BENEFITS						

2. Operating Cost

Expenditure Category

Q/A Fee i.e Contract Administrator, etc.	\$10,712	\$10,688	\$21,400
TOTAL OPERATING COST	\$10,712	\$10,688	\$21,400
TOTAL INDIRECT COST (Salaries & Benefits + Operating Cost)	\$10,712	\$10,688	\$21,400

HSA# 5

**APPENDIX A-5 – SERVICES TO BE PROVIDED
MERCY HOUSING CALIFORNIA**

**RAD Housing Support Services at JFK Towers (2451 Sacramento Street)
July 1, 2017 to June 30, 2019**

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services, a division of the Human Services Agency
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that results in substantial functional limitations in one or more major life activity.
Grantee	Mercy Housing
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted housing development units at JFK Towers (2451 Sacramento Street).

IV. Description of Services

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities

- Build tenant base
 - Develop neighborhood partnerships
- 2) Community Building
- Facilitate community organizing and host events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase access to information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities
- 3) Service Connection
- Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will hire, train, and supervise 1.25 FTE (leveraged and/or grant funded) to provide services at JFK Towers (2451 Sacramento Street) during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.

Health and Wellness:

- Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.
- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.

Housing Stability:

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.

Community Engagement:

- Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.

V. Location and Time of Services

Services will be provided at JFK Towers (2451 Sacramento Street), Monday through Friday, during regular office hours of 9 a.m. to 5 p.m., excluding holidays.

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.
- Grantee will communicate and collaborate regularly with DAAS to help provide logistical and operational support to the program and to provide quality services to tenants.
- Grantee will work collaboratively with DAAS to strategize program direction and services provision.
- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
- Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, and provide documentation that tracks demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Grantee will have individual and group service encounters with at least 50% of the tenants per month.
- Grantee will provide to tenants a minimum of one (1) activity or event per week (or 52 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel “strongly” or “very strongly” about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: “How strongly do you feel about being connected and involved in the tenant/resident community at [site]”? The options should be “Very strongly”, “Strongly”, “Somewhat”, “Not at all”.
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will “agree” or “highly agree” that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: “Do you have better access to services that improve your health and wellness?” The options should be “Highly agree”, “Agree”, “Neutral”, “Disagree”, “Highly disagree”.
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII - Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
 - Number and percentage of unduplicated tenants with individual and group service encounters.
 - Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII - Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
 - Number and percentage of tenants who have rated overall service as “Excellent” or “Good” in Tenant Satisfaction Survey, and number and percentage of response rate.
 - Number and percentage of unduplicated tenants who were outreached to.
 - Number and percentage of households that have maintained or have obtained stable housing.
- C. Grantee will provide Ad Hoc reports as required by the Department.
- D. For assistance with reporting requirements or submission of reports, contact:

Victoria.Chan@sfgov.org
Contract Manager, Office of Contract Management
Human Services Agency

or

Carrie.Wong@sfgov.org
Director, Long Term Care Operations
Department of Aging and Adult Services

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.

- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D
1	Appendix B-5, Page 1			
2	Document Date: 4/25/2017			
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY			
4				
5	Contractor's Name		Contract Term	
6	Mercy Housing : JFK Towers		July 1, 2017 - June 30, 2019	
7	(Check One) ___ New <u>X</u> Renewal ___ Modification			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	Program: Rental Assistance Demonstration			TOTAL
10	Budget Reference Page No.(s)			
11	Program Term	7/1/17-6/30/18	7/1/18-6/30/19	7/1/17-6/30/19
12	Human Services Agency Expenditures			
13	Salaries & Benefits	\$20,250	\$20,250	\$40,500
14	Operating Expense	\$38,087	\$38,087	\$76,174
15	Capital Expenditure	\$0	\$0	\$0
16	Subtotal	\$58,337	\$58,337	\$116,674
17	Indirect Percentage (%)	13%	13%	13%
18	Indirect Cost (Line 16 X Line 17)	\$7,584	\$7,584	\$15,168
19	Total HSA Expenditures	\$65,921	\$65,921	\$131,842
20	Developer Match Expenditures			
21	Salaries & Benefits	\$81,000	\$81,000	\$162,000
22	Operating Expense	\$0	\$0	\$0
23	Capital Expenditure	\$0	\$0	\$0
24	Total Developer Expenditures	\$81,000	\$81,000	\$162,000
25				
26	Total HSA and Developer Expenditures	\$146,921	\$146,921	\$293,842
27	HSA Revenues			
28	Local General Fund	\$65,921	\$65,921	\$131,842
29				
30				
31				
32				
33				
34	TOTAL HSA REVENUES	\$65,921	\$65,921	\$131,842
35	Developer Revenues			
36	Developer Match Funds	\$81,000	\$81,000	\$162,000
37				
38				
39				
40	Total Developer Revenues	\$81,000	\$81,000	\$162,000
41	Total Revenues	\$146,921	\$146,921	\$293,842
42	Full Time Equivalent (FTE)	1.25	1.25	
44	Prepared by: Samantha Hogg	Telephone No. (415) 355-7120		
45	HSA-CO Review Signature:	_____		
46	HSA #1			
47				

	A	B	C	D	E	F
1	Appendix B-5, Page 2					
2	Document Date: 4/25/2017					
3						
4	Mercy Housing : JFK Towers					
5						
6						
7	Salaries & Benefits Detail					
8						
9						
10			Human Services Agency		Human Services Agency	
11			7/1/17-6/30/18		7/1/18-6/30/19	
12	POSITION TITLE	TERM	FTE	SALARIES	FTE	SALARIES
13	Resident Services Coordinator		0.25	\$15,820	0.25	\$15,820
14						
15						
16						
17						
18						
19						
20						
21						
22						
23	TOTALS		0.25	\$15,820	0.25	\$15,820
24						
25						
26	EMPLOYEE FRINGE BENEFITS		28%	\$4,430	28%	\$4,430
27						
28						
29	TOTAL HSA SALARIES & BENEFITS			\$20,250		\$20,250
30						
31	DEVELOPER MATCH					
32	POSITION TITLE					
33	Resident Services Coordinator		1.00	\$63,281	1.00	\$63,281
34						
35						
36						
37						
38						
39	TOTALS		1.00	\$63,281	1.00	\$63,281
40						
41	EMPLOYEE FRINGE BENEFITS		28%	\$17,719	28%	\$17,719
42						
43	TOTAL DEVELOPER SALARIES & BENEFITS			\$81,000		\$81,000
44	TOTAL SALARIES & BENEFITS		1.25	\$101,250	1.25	\$101,250
45						
46	HSA #2					
47						

4 Mercy Housing : JFK Towers

7 **Operating Expense Detail**

9		Human Services Agency	Human Services Agency	TOTAL
10	HSA Expenditure Category	TERM 7/1/17-6/30/18	7/1/18-6/30/19	7/1/17-6/30/19
11	Rental of Property			
12	Telephone	960	960	1,920
13	Office Supplies, Postage	1,630	1,630	3,260
14	Maintenance Supplies and Repair			
15	Printing and Reproduction			
16	Insurance			
17	Staff Travel (local) & Training	2,000	2,000	4,000
18	Law Library			
19	Membership/Dues			
20	Rental of Equipment			
21	Senior Right Bulletin			
22				
23				
24				
25	OTHER			
26	Supplies for Monthly Community Projects & Events. (I	24,500	24,500	49,000
27	Supervision	8,997	8,997	17,994
28				
29				
30				
31	TOTAL HSA OPERATING EXPENSE	\$38,087	\$38,087	\$76,174
32				
33	Developer Match Operating Expense			
34	Rental of Property			
35	Telephone			
36	Office Supplies, Postage			
37	Printing and Reproduction			
38	Insurance			
39	Law Library			
40	Membership/Dues			
41	Rental of Equipment			
42	Volunteer Expenses (Receptionist/intake)			
43	Client Costs			
44	Maintenance Supplies and Repair			
45	Utilities			
46	Janitorial service & supplies			
47				
48	TOTAL DEVELOPER OPERATING EXPENSE	\$0	\$0	\$0
49				
50	TOTAL OPERATING EXPENSE	\$38,087	\$38,087	\$76,174
51				
52	HSA #3			
53				

Mercy Housing : JFK Towers
 (Same as Line 6 on HSA #1)

Indirect Cost Detail

1. Salaries and Benefits		Human Services Agency		Human Services Agency		TOTAL
TERM		7/1/17-6/30/18		7/1/18-6/30/19		7/1/17-6/30/19
Position Title	FTE	SALARIES	FTE	SALARIES	SALARIES	
EMPLOYEE FRINGE BENEFITS	%		%			
TOTAL SALARIES & BENEFITS						
2. Operating Cost						
<u>Expenditure Category</u>						
Q/A Fee i.e Contract Administrator, etc.		\$7,584		\$7,584		\$15,168
TOTAL OPERATING COST		\$7,584		\$7,584		\$15,168
TOTAL INDIRECT COST (Salaries & Benefits + Operating Cost)		\$7,584		\$7,584		\$15,168

HSA# 5

**APPENDIX A-6 – SERVICES TO BE PROVIDED
MERCY HOUSING CALIFORNIA**

**RAD Housing Support Services at 2698 California Street
July 1, 2017 to June 30, 2019**

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services, a division of the Human Services Agency
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that results in substantial functional limitations in one or more major life activity.
Grantee	Mercy Housing
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted housing development units at 2698 California Street.

IV. Description of Services

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities

- Build tenant base
 - Develop neighborhood partnerships
- 2) Community Building
- Facilitate community organizing and host events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase access to information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities
- 3) Service Connection
- Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will hire, train, and supervise 1.00 FTE (leveraged and/or grant funded) to provide services at 2698 California Street during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.

Health and Wellness:

- Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.
- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.
- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.

Housing Stability:

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.

Community Engagement:

- Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.

V. Location and Time of Services

Services will be provided at 2698 California Street, Monday through Friday, during regular office hours of 9 a.m. to 5 p.m., excluding holidays.

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.
- Grantee will communicate and collaborate regularly with DAAS to help provide logistical and operational support to the program and to provide quality services to tenants.
- Grantee will work collaboratively with DAAS to strategize program direction and services provision.
- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
- Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.
- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, and provide documentation that tracks demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Grantee will have individual and group service encounters with at least 50% of the tenants per month.
- Grantee will provide to tenants a minimum of one (1) activity or event per week (or 52 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel “strongly” or “very strongly” about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: “How strongly do you feel about being connected and involved in the tenant/resident community at [site]”? The options should be “Very strongly”, “Strongly”, “Somewhat”, “Not at all”.
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will “agree” or “highly agree” that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: “Do you have better access to services that improve your health and wellness?” The options should be “Highly agree”, “Agree”, “Neutral”, “Disagree”, “Highly disagree”.
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII - Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
 - Number and percentage of unduplicated tenants with individual and group service encounters.
 - Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII - Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
 - Number and percentage of tenants who have rated overall service as “Excellent” or “Good” in Tenant Satisfaction Survey, and number and percentage of response rate.
 - Number and percentage of unduplicated tenants who were outreached to.
 - Number and percentage of households that have maintained or have obtained stable housing.
- C. Grantee will provide Ad Hoc reports as required by the Department.
- D. For assistance with reporting requirements or submission of reports, contact:

Victoria.Chan@sfgov.org
Contract Manager, Office of Contract Management
Human Services Agency

or

Carrie.Wong@sfgov.org
Director, Long Term Care Operations
Department of Aging and Adult Services

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D
1	Appendix B-6, Page 1			
2	Document Date: 04/25/2017			
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY			
4				
5	Contractor's Name		Contract Term	
6	Mercy Housing : 2698 California		July 1, 2017 - June 30, 2019	
7	(Check One) ___ New ___X___ Renewal ___ Modification			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	Program: Rental Assistance Demonstration			TOTAL
10	Budget Reference Page No.(s)			
11	Program Term	7/1/17-6/30/18	7/1/18-6/30/19	7/1/17-6/30/19
12	Human Services Agency Expenditures			
13	Salaries & Benefits	\$20,250	\$20,250	\$40,500
14	Operating Expense	\$21,508	\$21,508	\$43,016
15	Capital Expenditure	\$0	\$0	\$0
16	Subtotal	\$41,758	\$41,758	\$83,516
17	Indirect Percentage (%)	13%	13%	13%
18	Indirect Cost (Line 16 X Line 17)	\$5,429	\$5,429	\$10,858
19	Total HSA Expenditures	\$47,187	\$47,187	\$94,374
20	Developer Match Expenditures			
21	Salaries & Benefits	\$60,750	\$60,750	\$121,500
22	Operating Expense	\$0	\$0	\$0
23	Capital Expenditure	\$0	\$0	\$0
24	Total Developer Expenditures	\$60,750	\$60,750	\$121,500
25				
26	Total HSA and Developer Expenditures	\$107,937	\$107,937	\$215,874
27	HSA Revenues			
28	Local General Fund	\$47,187	\$47,187	\$94,374
29				
30				
31				
32				
33				
34	TOTAL HSA REVENUES	\$47,187	\$47,187	\$94,374
35	Developer Revenues			
36	Developer Match Funds	\$60,750	\$60,750	\$121,500
37				
38				
39				
40	Total Developer Revenues	\$60,750	\$60,750	\$121,500
41	Total Revenues	\$107,937	\$107,937	\$215,874
42	Full Time Equivalent (FTE)	1.00	1.00	2.00
44	Prepared by: Samantha Hogg		Telephone No. (415) : Date 04/25/2017	
45	HSA-CO Review Signature: _____			
46	HSA #1			
47				

	A	B	C	D	E	F
1	Appendix B-6, Page 2					
2	Document Date: 04/25/2017					
3						
4	Mercy Housing : 2698 California					
5						
6						
7	Salaries & Benefits Detail					
8						
9						
10			Human Services Agency		Human Services Agency	TOTAL
11		TERM	7/1/17-6/30/18		7/1/18-6/30/19	7/1/17-6/30/19
12	POSITION TITLE		FTE	SALARIES	FTE	SALARIES
13	Resident Services Coordinator		0.25	\$15,820	0.25	\$15,820
14						
15						
16						
17						
18						
19						
20						
21						
22						
23	TOTALS		0.25	\$15,820	0.25	\$15,820
24						
25						
26	EMPLOYEE FRINGE BENEFITS		28.0%	\$4,430	28.0%	\$4,430
27						
28						
29	TOTAL HSA SALARIES & BENEFITS			\$20,250		\$20,250
30						
31	DEVELOPER MATCH POSITION TITLE					
32	Resident Services Coordinator		0.75	\$47,460	0.75	\$47,460
33						
34						
35						
36						
37						
38	TOTALS		0.75	\$47,460	0.75	\$47,460
39						
40	EMPLOYEE FRINGE BENEFITS		28.0%	\$13,290	28.0%	\$13,290
41						
42	TOTAL DEVELOPER SALARIES & BENEFITS			\$60,750		\$60,750
43	TOTAL SALARIES & BENEFITS		1.00	\$81,000	1.00	\$81,000
44						
45	HSA #2					
46						

**APPENDIX A-1 – SERVICES TO BE PROVIDED
THE TENDERLOIN NEIGHBORHOOD DEVELOPMENT CORPORATION**

**RAD Housing Support Services at 939-951 EDDY STREET
July 1, 2017 to June 30, 2019**

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services, a division of the Human Services Agency
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that results in substantial functional limitations in one or more major life activity.
Grantee	Tenderloin Neighborhood Development Corporation
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older
Subcontractor	Northern California Presbyterian Homes and Services (NCPHS) will be contracted by the grantee and paid with grant funds to provide services and/or achieve service and outcome objectives as required by this grant.

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units at 939-951 Eddy Street.

IV. Description of Services

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities
 - Build tenant base
 - Develop neighborhood partnerships
- 2) Community Building
 - Community organizing and events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities
- 3) Service Connection
 - Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will hire, train, and supervise 1 FTE (leveraged and/or grant funded) to provide services at 939-951 Eddy Street during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.

Health and Wellness:

- Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.
- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.

- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.

Housing Stability:

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.

Community Engagement:

- Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.

V. Location and Time of Services

Services will be provided at 939-951 Eddy Street, Monday through Friday during regular office hours, excluding holidays.

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.
- Grantee will communicate and collaborate regularly with DAAS to help provide logistical and operational support to the program and to provide quality services to tenants.
- Grantee will work collaboratively with DAAS to strategize program direction and services provision.
- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
- Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.

- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, and provide documentation that tracks demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Grantee will have individual and group service encounters with at least 65% of the tenants per month.
- Grantee will provide to tenants a minimum of two (2) activities or events per week (or 104 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel “strongly” or “very strongly” about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: “How strongly do you feel about being connected and involved in the tenant/resident community at [site]? The options should be “Very strongly”, “Strongly”, “Somewhat”, “Not at all”.
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will “agree” or “highly agree” that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: “Do you have better access to services that improve your health and wellness?” The options should be “Highly agree”, “Agree”, “Neutral”, “Disagree”, “Highly disagree”.
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII - Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
 - Number and percentage of unduplicated tenants with individual and group service encounters.

- Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII - Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
- Number and percentage of tenants who have rated overall service as “Excellent” or “Good” in Tenant Satisfaction Survey, and number and percentage of response rate.
 - Number and percentage of unduplicated tenants who were outreached to.
 - Number and percentage of households that have maintained or have obtained stable housing.
- C. Grantee will provide Ad Hoc reports as required by the Department.
- D. For assistance with reporting requirements or submission of reports, contact:

Victoria.Chan@sfgov.org
 Contract Manager, Office of Contract Management
 Human Services Agency

or

Carrie.Wong@sfgov.org
 Director, Long Term Care Operations
 Department of Aging and Adult Services

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D
1	Appendix B-1, Page 1			
2	Document Date: 4/13/2017			
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY			
4	BY PROGRAM			
5	Contractor's Name		Contract Term	
6	Tenderloin Neighborhood Development Corporation		July 1, 2017-June 30, 2019	
7	(Check One) ___ New __X__ Renewal ___ Modification			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	Program: Rental Assistance Demonstration - 939-51 Eddy Street			TOTAL
10	Budget Reference Page No.(s)			
11	Program Term		7/1/17-6/30/18	7/1/18-6/30/19
12	Human Services Agency Expenditures			
13	Salaries & Benefits	\$0	\$0	\$0
14	Operating Expense	\$30,129	\$30,129	\$60,258
15	Capital Expenditure	\$0	\$0	\$0
16	Subtotal	\$30,129	\$30,129	\$60,258
17	Indirect Percentage (%)	6%	6%	6%
18	Indirect Cost (Line 16 X Line 17)	\$1,808	\$1,808	\$3,616
19	Total HSA Expenditures	\$31,937	\$31,937	\$63,874
20	Developer Match Expenditures			
21	Salaries & Benefits	\$0	\$0	\$0
22	Operating Expense	\$76,415	\$76,415	\$152,830
23	Capital Expenditure	0	0	\$0
24	Subtotal	\$76,415	\$76,415	\$152,830
25	Indirect Percentage (%)	6%	6%	6%
26	Indirect Cost (Line 16 X Line 17)	\$4,585	\$4,585	\$9,170
27	Total Developer Expenditures	\$81,000	\$81,000	\$162,000
28				
29	Total HSA and Developer Expenditures	\$112,937	\$112,937	\$225,874
30	HSA Revenues			
31	Local General Fund	\$31,937	\$31,937	\$63,874
32				
33				
34				
35				
36				
37				
38				
39	TOTAL HSA REVENUES	\$31,937	\$31,937	\$63,874
40	Developer Revenues			
41	Developer Match Funds	\$81,000	\$81,000	\$162,000
42				
43				
44				
45	Total Developer Revenues	\$81,000	\$81,000	\$162,000
46	Total Revenues	\$112,937	\$112,937	\$225,874
47	Full Time Equivalent (FTE)			
49	Prepared by: Paul Sussman		Telephone No.	Date
50	HSA-CO Review Signature: _____			
51	HSA #1			
52				

**APPENDIX A-2 – SERVICES TO BE PROVIDED
THE TENDERLOIN NEIGHBORHOOD DEVELOPMENT CORPORATION**

**RAD Housing Support Services at 430 TURK STREET
July 1, 2017 to June 30, 2019**

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services, a division of the Human Services Agency
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that results in substantial functional limitations in one or more major life activity.
Grantee	Tenderloin Neighborhood Development Corporation
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older
Subcontractor	Northern California Presbyterian Homes and Services (NCPHS) will be contracted by the grantee and paid with grant funds to provide services and/or achieve service and outcome objectives as required by this grant.

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units at 430 Turk Street.

IV. Description of Services

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities
 - Build tenant base
 - Develop neighborhood partnerships
- 2) Community Building
 - Community organizing and events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities
- 3) Service Connection
 - Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will subcontract with NCPHS to hire, train, and supervise 1.25 FTE (leveraged and/or grant funded) to provide services at 430 Turk Street during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.

Health and Wellness:

- Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.
- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.

- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.

Housing Stability:

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.

Community Engagement:

- Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.

V. Location and Time of Services

Services will be provided at 430 Turk Street, Monday through Friday during regular office hours, excluding holidays.

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.
- Grantee will communicate and collaborate regularly with DAAS to help provide logistical and operational support to the program and to provide quality services to tenants.
- Grantee will work collaboratively with DAAS to strategize program direction and services provision.
- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
- Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.

- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, and provide documentation that tracks demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Grantee will have individual and group service encounters with at least 65% of the tenants per month.
- Grantee will provide to tenants a minimum of two (2) activities or events per week (or 104 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel “strongly” or “very strongly” about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: “How strongly do you feel about being connected and involved in the tenant/resident community at [site]? The options should be “Very strongly”, “Strongly”, “Somewhat”, “Not at all”.
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will “agree” or “highly agree” that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: “Do you have better access to services that improve your health and wellness?” The options should be “Highly agree”, “Agree”, “Neutral”, “Disagree”, “Highly disagree”.
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII - Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.

- Number and percentage of unduplicated tenants with individual and group service encounters.

- Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII - Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
- Number and percentage of tenants who have rated overall service as “Excellent” or “Good” in Tenant Satisfaction Survey, and number and percentage of response rate.
 - Number and percentage of unduplicated tenants who were outreached to.
 - Number and percentage of households that have maintained or have obtained stable housing.
- C. Grantee will provide Ad Hoc reports as required by the Department.
- D. For assistance with reporting requirements or submission of reports, contact:

Victoria.Chan@sfgov.org
 Contract Manager, Office of Contract Management
 Human Services Agency

or

Carrie.Wong@sfgov.org
 Director, Long Term Care Operations
 Department of Aging and Adult Services

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D
1				Appendix B-2, Page 1
2				Document Date: 4/13/2017
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY			
4	BY PROGRAM			
5	Contractor's Name		Contract Term	
6	Tenderloin Neighborhood Development Corporation		July 1, 2017-June 30, 2019	
7	(Check One) ___ New <u> X </u> Renewal ___ Modification			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	Program: Rental Assistance Demonstration - 430 Turk Street			TOTAL
10	Budget Reference Page No.(s)			
11	Program Term	7/1/17-6/30/18	7/1/18-6/30/19	7/1/17-6/30/19
12	Human Services Agency Expenditures			
13	Salaries & Benefits	\$0	\$0	\$0
14	Operating Expense	\$60,929	\$60,929	\$121,858
15	Capital Expenditure	\$0	\$0	\$0
16	Subtotal	\$60,929	\$60,929	\$121,858
17	Indirect Percentage (%)	4.5%	4.5%	4.5%
18	Indirect Cost (Line 16 X Line 17)	\$2,742	\$2,742	\$5,484
19	Total HSA Expenditures	\$63,671	\$63,671	\$127,342
20	Developer Match Expenditures			
21	Salaries & Benefits	\$0	\$0	\$0
22	Operating Expense	\$77,512	\$77,512	\$155,024
23	Capital Expenditure	0	0	\$0
24	Subtotal	\$77,512	\$77,512	\$155,024
25	Indirect Percentage (%)	4.5%	4.5%	4.5%
26	Indirect Cost (Line 16 X Line 17)	\$3,488	\$3,488	\$6,976
27	Total Developer Expenditures	\$81,000	\$81,000	\$162,000
28				
29	Total HSA and Developer Expenditures	\$144,671	\$144,671	\$289,342
30	HSA Revenues			
31	Local General Fund	\$63,671	\$63,671	\$127,342
32				
33				
34				
35				
36				
37				
38				
39	TOTAL HSA REVENUES	\$63,671	\$63,671	\$127,342
40	Developer Revenues			
41	Developer Match Funds	\$81,000	\$81,000	\$162,000
42				
43				
44				
45	Total Developer Revenues	\$81,000	\$81,000	\$162,000
46	Total Revenues	\$144,671	\$144,671	\$289,342
47	Full Time Equivalent (FTE)			
49	Prepared by: Paul Sussman	Telephone No.	Date	
50	HSA-CO Review Signature: _____			
51	HSA #1			
52				

**APPENDIX A-3 – SERVICES TO BE PROVIDED
THE TENDERLOIN NEIGHBORHOOD DEVELOPMENT CORPORATION**

**RAD Housing Support Services at Rosa Parks Senior Housing (1251 Turk Street)
July 1, 2017 to June 30, 2019**

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services, a division of the Human Services Agency
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that results in substantial functional limitations in one or more major life activity.
Grantee	Tenderloin Neighborhood Development Corporation
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older
Subcontractor	Northern California Presbyterian Homes and Services (NCPHS) will be contracted by the grantee and paid with grant funds to provide services and/or achieve service and outcome objectives as required by this grant.

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted housing development units at Rosa Parks Senior Housing (1251 Turk Street).

IV. Description of Services

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities
 - Build tenant base
 - Develop neighborhood partnerships
- 2) Community Building
 - Facilitate community organizing and events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase access to information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities
- 3) Service Connection
 - Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will hire, train, and supervise 2.5 FTE (leveraged and/or grant funded) to provide services at Rosa Parks Senior Housing (1251 Turk Street) during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.

Health and Wellness:

- Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.
- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.

- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.

Housing Stability:

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.

Community Engagement:

- Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.

V. Location and Time of Services

Services will be provided at Rosa Parks Senior Housing (1251 Turk Street), Monday through Friday, during regular office hours of 8:30 a.m. to 5 p.m., excluding holidays.

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.
- Grantee will communicate and collaborate regularly with DAAS to help provide logistical and operational support to the program and to provide quality services to tenants.
- Grantee will work collaboratively with DAAS to strategize program direction and services provision.
- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
- Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.

- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, and provide documentation that tracks demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Grantee will have individual and group service encounters with at least 50% of the tenants per month.
- Grantee will provide to tenants a minimum of one (1) activity or event per week (or 52 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel “strongly” or “very strongly” about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: “How strongly do you feel about being connected and involved in the tenant/resident community at [site]? The options should be “Very strongly”, “Strongly”, “Somewhat”, “Not at all”.
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will “agree” or “highly agree” that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: “Do you have better access to services that improve your health and wellness?” The options should be “Highly agree”, “Agree”, “Neutral”, “Disagree”, “Highly disagree”.
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII - Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
 - Number and percentage of unduplicated tenants with individual and group service encounters.

- Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII - Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
- Number and percentage of tenants who have rated overall service as “Excellent” or “Good” in Tenant Satisfaction Survey, and number and percentage of response rate.
 - Number and percentage of unduplicated tenants who were outreached to.
 - Number and percentage of households that have maintained or have obtained stable housing.
- C. Grantee will provide Ad Hoc reports as required by the Department.
- D. For assistance with reporting requirements or submission of reports, contact:

Victoria.Chan@sfgov.org
 Contract Manager, Office of Contract Management
 Human Services Agency

or

Carrie.Wong@sfgov.org
 Director, Long Term Care Operations
 Department of Aging and Adult Services

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D
1	Appendix B-3, Page 1			
2	Document Date: 4/13/2017			
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY			
4	BY PROGRAM			
5	Contractor's Name		Contract Term	
6	Tenderloin Neighborhood Development Corporation		July 1, 2017-June 30, 2019	
7	(Check One) ___ New <u>X</u> Renewal ___ Modification ___			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	Program: Rental Assistance Demonstration - Rosa Parks			TOTAL
10	Budget Reference Page No.(s)			
11	Program Term	7/1/17-6/30/18	7/1/18-6/30/19	7/1/17-6/30/19
12	Human Services Agency Expenditures			
13	Salaries & Benefits	\$0	\$0	\$0
14	Operating Expense	\$127,253	\$127,253	\$254,506
15	Capital Expenditure	\$0	\$0	\$0
16	Subtotal	\$127,253	\$127,253	\$254,506
17	Indirect Percentage (%)	4%	4%	4%
18	Indirect Cost (Line 16 X Line 17)	\$5,090	\$5,090	\$10,180
19	Total HSA Expenditures	\$132,343	\$132,343	\$264,686
20	Developer Match Expenditures			
21	Salaries & Benefits	\$0	\$0	\$0
22	Operating Expense	\$155,769	\$155,769	\$311,538
23	Capital Expenditure	\$0	\$0	\$0
24	Subtotal	\$155,769	\$155,769	\$311,538
25	Indirect Percentage (%)	4%	4%	4%
26	Indirect Cost (Line 16 X Line 17)	\$6,231	\$6,231	\$12,462
27	Total Developer Expenditures	\$162,000	\$162,000	\$324,000
28				
29	Total HSA and Developer Expenditures	\$294,343	\$294,343	\$588,686
30	HSA Revenues			
31	Local General Fund	\$132,343	\$132,343	\$264,686
32				
33				
34				
35				
36				
37				
38				
39	TOTAL HSA REVENUES	\$132,343	\$132,343	\$264,686
40	Developer Revenues			
41	Developer Match Funds	\$162,000	\$162,000	\$324,000
42				
43				
44				
45	Total Developer Revenues	\$162,000	\$162,000	\$324,000
46				
47	Total Revenues	\$294,343	\$294,343	\$588,686
48	Full Time Equivalent (FTE)	2.50	2.50	
50	Prepared by:	Paul Sussman	Telephone No.	
51	HSA-CO Review Signature:	_____		
52	HSA #1			
53				

**APPENDIX A-4 – SERVICES TO BE PROVIDED
THE TENDERLOIN NEIGHBORHOOD DEVELOPMENT CORPORATION**

**RAD Housing Support Services at 320 & 330 Clementina Street
July 1, 2017 to June 30, 2019**

I. Purpose of Grant

The Rental Assistance Demonstration (RAD) Program is an initiative from the U.S. Department of Housing and Urban Development (HUD) with the goal to preserve and improve public housing properties. The purpose of the grant is to provide support services to seniors and adults with disabilities residing in San Francisco RAD converted Housing Development units, to enhance residents' abilities to age in place, avoid premature institutionalization, and build community in their environments.

II. Definitions

Adult with Disability	Person 18 to 61 years of age living with a disability
CARBON	Human Services Agency's Contracts Administration Reporting and Billing Online (CARBON) system
DAAS	San Francisco Department of Aging and Adult Services, a division of the Human Services Agency
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments, that results in substantial functional limitations in one or more major life activity.
Grantee	Tenderloin Neighborhood Development Corporation
RAD	Rental Assistance Demonstration
Senior	Person who is 62 years and older
Subcontractor	Northern California Presbyterian Homes and Services (NCPHS) will be contracted by the grantee and paid with grant funds to provide services and/or achieve service and outcome objectives as required by this grant.

III. Target Population

Seniors and adults with disabilities residing in San Francisco RAD converted housing development units at 320 and 330 Clementina Street.

IV. Description of Services

The service provision model will be based on three principles:

- 1) Community Engagement
 - Establish trust
 - Map assets and identify needs
 - Begin community activities
 - Build tenant base
 - Develop neighborhood partnerships
- 2) Community Building
 - Facilitate community organizing and host events, including but not limited to support groups, food pantries, coffee hours, movie nights, exercise classes, Mobile Library, health screening, and community meals
 - Increase access to information and opportunities
 - Deeper tenant and neighborhood partnerships
 - Development of Health and Wellness, Educational, and Economic Mobility activities
- 3) Service Connection
 - Enhanced information and referral with follow up
 - Intentional support for housing stabilization
 - Ongoing Health and Wellness, Educational, and Economic Mobility Activities

Grantee will hire, train, and supervise 3.75 FTE (leveraged and/or grant funded) to provide services at 320 and 330 Clementina Street during the term of this grant.

The following core activities will be provided by the grantee under each service area:

Outreach:

- Establish and maintain positive relationships with tenants.
- Establish regular channels of communication with all tenants via newsletters, tenant meetings, monthly activity calendars, etc.

Health and Wellness:

- Establish and maintain relationships with neighborhood groups, city agencies, and community-based service providers with the goal of establishing robust referral partnerships and onsite programming.
- Provide service needs assessment, information and referral, crisis intervention and counseling with individuals and groups of tenants as needed.
- Follow up on service referrals; identify and attempt to resolve barriers that prevent tenants from accessing services to which they have been referred.

- Provide short-term case management services to tenants as needed, while working to connect those with a longer-term need to ongoing case management services.
- Serve as a liaison or advocate for tenants with outside service providers.

Housing Stability:

- Work cooperatively and as part of a team with property management staff to meet the needs of tenants.
- Conduct direct outreach to all tenants who become delinquent in rent payments and offer assistance in preparing rent payment plans and/or provide referrals to outside money management services.
- Conduct direct outreach to all tenants who are experiencing safety concerns, lease or house rule violations, or who have been involved in critical incidents.

Community Engagement:

- Plan and implement community building activities and educational programs that contribute to enhanced community living and personal well-being.

V. Location and Time of Services

Services will be provided at 320 and 330 Clementina Street, Monday through Friday, during regular office hours of 8 a.m. to 4:30 p.m., excluding holidays.

VI. Grantee Responsibilities

- Grantee is a mandated reporter for witnessed or suspected child and elder abuse/neglect.
- Grantee will be compliant with the Health Insurance Profitability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to the Grant Agreement.
- Grantee will resolve grievances related to support services at the program level and adhere to the DAAS Grievance Policy and Procedure.
- Grantee will provide training and ongoing supervision and oversight of all support service staff.
- Grantee will administer a Tenant Satisfaction Survey, in an anonymous format, to all tenants engaging in support service to gather input regarding the participant's direct experience.
- Grantee will communicate and collaborate regularly with DAAS to help provide logistical and operational support to the program and to provide quality services to tenants.
- Grantee will work collaboratively with DAAS to strategize program direction and services provision.
- Grantee will attend DAAS Commission, RAD-related, MOHCD, and other meetings as needed.
- Grantee will work collaboratively with other community-based organizations to enhance the services received by the tenants.

- Grantee will maintain accurate, up-to-date, confidential case files on all tenants, including documentation of all service contacts, and provide documentation that tracks demographic information, assessments, care plans, progress notes, and services provided.

VII. Service Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Grantee will have individual and group service encounters with at least 50% of the tenants per month.
- Grantee will provide to tenants a minimum of one (1) activity or event per week (or 52 annually). At least one (1) activity or event per month (or 12 annually) is an educational training, presentation, or workshop.
- All (100%) households that are at risk of eviction or housing instability are offered assistance or service addressing their needs.

VIII. Outcome Objectives

For grant term (July 1, 2017 through June 30, 2019):

- Tenants are connected and involved in their tenant/resident community. At least 50% of unduplicated tenants participating in the satisfaction survey will feel “strongly” or “very strongly” about being connected and involved in their tenant/resident community. Grantee should use the following standardized question: “How strongly do you feel about being connected and involved in the tenant/resident community at [site]? The options should be “Very strongly”, “Strongly”, “Somewhat”, “Not at all”.
- Tenants have better access to services improving their health and wellness. At least 50% of unduplicated tenants participating in the satisfaction survey will “agree” or “highly agree” that they have better access to services that improve their health and wellness. Grantee should use the following standardized question: “Do you have better access to services that improve your health and wellness?” The options should be “Highly agree”, “Agree”, “Neutral”, “Disagree”, “Highly disagree”.
- Tenants have stable housing. At least 95% of households will maintain or have obtained stable housing.

IX. Reporting Requirements

A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII - Service Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.

- Number and percentage of unduplicated tenants with individual and group service encounters.

- Number and type of event, activity, training, or educational workshop conducted onsite or offsite, and number of attendees per activity.
 - Number and percentage of households that were at risk of eviction or housing instability and were offered assistance or service addressing their needs.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VIII - Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
- Number and percentage of tenants who have rated overall service as “Excellent” or “Good” in Tenant Satisfaction Survey, and number and percentage of response rate.
 - Number and percentage of unduplicated tenants who were outreached to.
 - Number and percentage of households that have maintained or have obtained stable housing.
- C. Grantee will provide Ad Hoc reports as required by the Department.
- D. For assistance with reporting requirements or submission of reports, contact:

Victoria.Chan@sfgov.org
 Contract Manager, Office of Contract Management
 Human Services Agency

or

Carrie.Wong@sfgov.org
 Director, Long Term Care Operations
 Department of Aging and Adult Services

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of participant eligibility, back-up documentation for reporting progress towards meeting service and outcome objectives, QA reports, satisfaction survey results, and onsite monitoring.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D
1	Appendix B-4, Page 1			
2	Document Date: 4/13/2017			
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY			
4	BY PROGRAM			
5	Contractor's Name		Contract Term	
6	Tenderloin Neighborhood Development Corporation		July 1, 2017-June 30, 2019	
7	(Check One) ___ New <u>X</u> Renewal ___ Modification			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	Program: Rental Assistance Demonstration - Clementina			TOTAL
10	Budget Reference Page No.(s)			
11	Program Term	7/1/17-6/30/18	7/1/18-6/30/19	7/1/17-6/30/19
12	Human Services Agency Expenditures			
13	Salaries & Benefits	\$0	\$0	\$0
14	Operating Expense	\$263,715	\$263,715	\$527,430
15	Capital Expenditure	\$0	\$0	\$0
16	Subtotal	\$263,715	\$263,715	\$527,430
17	Indirect Percentage (%)	4%	4%	4%
18	Indirect Cost (Line 16 X Line 17)	\$10,549	\$10,549	\$21,098
19	Total HSA Expenditures	\$274,264	\$274,264	\$548,528
20	Developer Match Expenditures			
21	Salaries & Benefits	\$0	\$0	\$0
22	Operating Expense	\$155,769	\$155,769	\$311,538
23	Capital Expenditure	\$0	\$0	\$0
24	Subtotal	\$155,769	\$155,769	\$311,538
25	Indirect Percentage (%)	4%	4%	4%
26	Indirect Cost (Line 16 X Line 17)	\$6,231	\$6,231	\$12,462
27	Total Developer Expenditures	\$162,000	\$162,000	\$324,000
28				
29	Total HSA and Developer Expenditures	\$436,264	\$436,264	\$872,528
30	HSA Revenues			
31	Local General Fund	\$274,264	\$274,264	\$548,528
32				
33				
34				
35				
36				
37				
38				
39	TOTAL HSA REVENUES	\$274,264	\$274,264	\$548,528
40	Developer Revenues			
41	Developer Match Funds	\$162,000	\$162,000	\$324,000
42				
43				
44				
45	Total Developer Revenues	\$162,000	\$162,000	\$324,000
46				
47	Total Revenues	\$436,264	\$436,264	\$872,528
48	Full Time Equivalent (FTE): 3.75			
50	Prepared by:	Paul Sussman	Telephone No.	
51	HSA-CO Review Signature:	_____		
52	HSA #1			
53				

