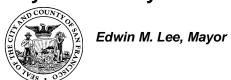
City and County of San Francisco



Human Services Agency

Department of Human Services
Department of Aging and Adult Services

Trent Rhorer, Executive Director

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- 7/1/17-6/30/17 6/30/19

GRANT AMOUNT: \$2,098,095 \$3,238,348 \$323,831 \$3,562,179

FUNDING SOURCE County State Federal Contingency Total

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. <u>Program Monitoring</u>: 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 | В | С | E | | | | | | |
|----------|--|----------------------|----------------------|----------------------|--|--|--|--|--|--|
| 1 | , , , | | | pendix B-1, Page 1 | | | | | | |
| 2 | | | | nent Date: 4/18/2017 | | | | | | |
| | LILIMAN CERVICES ACENS | CONTRACT BUD | | | | | | | | |
| 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 RenewalX | Modification | .,,, | | | | | | | |
| | - | Modification | | | | | | | | |
| 8 | If modification, Effective Date of Mod. No. of | of Mod. | | | | | | | | |
| | | | | | | | | | | |
| 9 | Program: Rental Assistance Demonstration - 18 | th 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 | | | | | | |
| | Operating Expense | \$82,729 | \$84,052 | \$166,781 | | | | | | |
| | Capital Expenditure | \$0 | \$0 | \$0 | | | | | | |
| | Subtotal | \$82,729 | \$84,052 | \$166,781 | | | | | | |
| | Indirect Percentage (%) | 12.00% | 10.24% | | | | | | | |
| | 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 | | | | | | | | | |
| | Salaries & Benefits | \$0 | \$0 | \$0 | | | | | | |
| 22 | Operating Expense | \$72,321 | \$73,479 | \$145,800 | | | | | | |
| | Capital Expenditure | \$0 | \$0 | \$0 | | | | | | |
| | Subtotal | \$72,321 | \$73,479 | \$145,800 | | | | | | |
| | Indirect Percentage (%) | 12.00% | 10.24% | | | | | | | |
| | Indirect Cost (Line 16 X Line 17) | \$8,678 | \$7,522 | \$16,200 | | | | | | |
| 27 | Total Developer Expenditures | \$80,999 | \$81,001 | \$162,000 | | | | | | |
| 28 | | | | | | | | | | |
| | Total HSA and Developer Expenditures | \$173,656 | \$173,656 | \$347,312 | | | | | | |
| 30 | HSA Revenues | | | | | | | | | |
| | 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 | 402,000 | 402,000 | ψ.00,01 <u>Z</u> | | | | | | |
| | Developer Match Funds | \$81,000 | \$81,000 | \$162,000 | | | | | | |
| 42 | -1 | \$3.,500 | 40.,000 | \$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 | | | | | | | | |
| | Prepared by: Susan Neufeld | Telephone No.: 415-3 | 21-3526 | Date 4/18/17 | | | | | | |
| | HSA-CO Review Signature: | , | | | | | | | | |
| | | | | | | | | | | |
| | HSA #1 | | | | | | | | | |
| 52 | | | | | | | | | | |

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|--------|---|------|----------|-----------|----------|--------------|-----|-------|----------|---------------|
| 1 | | • | • | • | | | • | | | B-1, Page 2 |
| 3 | | | | | | | | Docun | nent Dai | te: 4/18/2017 |
| 4 | Contractor's Name: BRIDGE Housing Corporat | ion | | | | | | | | |
| 5 6 | | | | | | | | | | |
| 7 | | Ope | rating E | Expense [| Detail | | | | | |
| 8 | | | Human | Services | Hum | an Services | 1 | | | |
| 9 | | | | ency | I | Agency | | | - | ΓΟΤΑL |
| 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 and Office Furniture | | | | | | | | | |
| 13 | Program/Office Supplies | | | | | | | | | |
| 14 | Utilities (Electricity, Water, Sewer, Gas, Phone) | | \$ | 430 | \$ | 430 | | | \$ | 860 |
| 15 | Printing and Reproduction | | | | | | | | | |
| 16 | Insurance | | | | | | | | | |
| 17 | Staff Travel (Local & Out of Town) | | \$ | 100 | \$ | 100 | | | \$ | 200 |
| | Law Library | | | | | | | | | |
| | Membership/Dues | | | | | | | | | |
| | Rental of Equipment | | | | - | | | | | |
| | Senior Right Bulletin | | | | | | | | | |
| 22 | Sellor Right Bulletin | | | | | | | | | |
| | Staff Training | _ | | | | | | | | |
| 24 | Sub-Contractor (NCPHS) | _ | \$ | 81,182 | \$ | 82,505 | | | \$ | 163,687 |
| | OTHER | | | | | | | | | |
| | Language Line Pangea/AASC Database | _ | \$ | 1,017 | \$ | 1,017 | | | \$ | 2,034 |
| | Educational Programs | - | Ψ | 1,017 | Ψ | 1,017 | | | Ψ | 2,004 |
| 29 | | - | | | | | | | | |
| 30 | | | | | | | | | | |
| 31 | TOTAL HSA OPERATING EXPENSE | | \$ | 82,729 | \$ | 84,052 | | | \$ | 166,781 |
| 32 | | | | | | | | | | |
| 33 | Developer Match Operating Expense | | | | | | | | | |
| 34 | Rental of Property | | | | | | | | | |
| 35 | Telephone and Furniture | | | | | | | | | |
| 36 | Office Supplies, Postage | | | | | | | | | |
| 37 | Printing and Reproduction | | | | | | | | | |
| 38 | Insurance | | | | | | | | | |
| 39 | Law Library | | | | | | | | | |
| | Membership/Dues | | | | | | | | | |
| | Rental of Equipment | | _ | | | | | | | |
| | Volunteer Expenses (Receptionist/intake) | | | | | | | | | |
| | Client Costs | | | | | | | | | |
| | Educational Programs | | | | | | | | | |
| | Charting | | | | | | | | | |
| | Staff Training | | | | | | | | | |
| | Sub-Contractor (NCPHS) | | \$ | 72,321 | \$ | 73,479 | | | \$ | 145,800 |
| 48 | | | | ,v | <u> </u> | . 0, 0 | | | | |
| | TOTAL DEVELOPER OPERATING EXPENSE | | \$ | 72,321 | \$ | 73,479 | | | \$ | 145,800 |
| 50 | | | | | | | | | | |
| 52 | TOTAL OPERATING EXPENSE | | \$ | 155,050 | \$ | 157,531 | · - | | \$ | 312,581 |

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. <u>Program Monitoring</u>: 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. <u>Fiscal Compliance and Contract Monitoring</u>: 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 A | В | С | E | | | | | |
|----|--|----------------------|-----------------------|------------------------|--|--|--|--|--|
| 1 | | | | Appendix B-2, Page 1 | | | | | |
| 2 | | | Do | cument Date: 4/18/2017 | | | | | |
| 3 | HUMAN SERVICES AGENCY | CONTRACT BUD | GET SUMMARY | | | | | | |
| 4 | BY PROGRAM | | | | | | | | |
| | 0 | BITROOKA | | | | | | | |
| 5 | Contractor's Name | | Contract Term: | | | | | | |
| 6 | BRIDGE Housing Corporation | | July 1, 2017 - June 3 | 0, 2019 | | | | | |
| 7 | (Check One) New Renewal _X_ | Modification | | | | | | | |
| 0 | If modification Effective Date of Med. No. | of Mad | | | | | | | |
| 8 | If modification, Effective Date of Mod. No. of | of Mod. | | | | | | | |
| 9 | Program: Rental Assistance Demonstration - 46 | 62 Duboce | | | | | | | |
| | | | | T0T41 | | | | | |
| | Budget Reference Page No.(s) | 7/4/47 0/00/40 | 7/4/40 0/00/40 | TOTAL | | | | | |
| 11 | Program Term Human Services Agency Expenditures | 7/1/17 - 6/30/18 | 7/1/18 - 6/30/19 | 7/1/17-6/30/19 | | | | | |
| | | . | 60 | ФО. | | | | | |
| | Salaries & Benefits Operating Expense | \$0 \$43,935 | \$0 \$44,677 | \$0 \$88,612 | | | | | |
| | Capital Expenditure | \$43,935 | \$44,677 | \$00,012 | | | | | |
| 16 | Subtotal | \$43,935 | \$44,677 | \$88,612 | | | | | |
| 17 | Indirect Percentage (%) | 8.54% | 6.74% | | | | | | |
| | Indirect Cost (Line 16 X Line 17) | \$3,752 | \$3,010 | \$6,762 | | | | | |
| | 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 | | | | | |
| | Capital Expenditure | \$0 | \$0 | \$0 | | | | | |
| | Subtotal | \$55,970 | \$56,915 | \$112,885 | | | | | |
| | Indirect Percentage (%) | 8.54% | 6.74% | | | | | | |
| | Indirect Cost (Line 16 X Line 17) | \$4,780 | \$3,835 | \$8,615 | | | | | |
| 27 | Total Developer Expenditures | \$60,750 | \$60,750 | \$121,500 | | | | | |
| 28 | | | | | | | | | |
| | Total HSA and Developer Expenditures | \$108,437 | \$108,437 | \$216,874 | | | | | |
| 30 | HSA Revenues | | . | . | | | | | |
| | Local General Fund | \$47,687 | \$47,687 | \$95,374 | | | | | |
| 32 | | | | | | | | | |
| 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 \$0 | | | | | |
| 43 | | | | \$0 | | | | | |
| 45 | Total Developer Revenues | \$60,750 | \$60,750 | \$121,500 | | | | | |
| 46 | Total Revenues | \$108,437 | \$108,437 | \$216,874 | | | | | |
| | | | ψ100, 1 37 | Ψ210,074 | | | | | |
| 47 | Full Time Equivalent (FTE) | 1.20 | | | | | | | |
| 49 | Prepared by: Susan Neufeld | Telephone No.: 415-3 | 21-3526 | Date 4/18/17 | | | | | |
| | HSA-CO Review Signature: | | | | | | | | |
| | | | | • | | | | | |
| 51 | HSA #1 | | | | | | | | |
| 52 | | | | | | | | | |

| | A B C | D | | E F | F | G | НЈ | K |
|----------|---|-------------------|----------|--------------------------|----------|------------------------------|------------|---|
| 2 | | | | | | | | B-2, Page 2 nt Date: 4/18/2017 |
| 3 | | | | | | | Documen | it Bate. 4/10/2017 |
| 5 | Contractor's Name: BRIDGE Housing Corporati | ion | | | | | | |
| 6 | | _ | | _ | | | | |
| 7 | | Ope | rating E | Expense D | etail | | | |
| 9 | | | | Services | | n Services | | TOTAL |
| | HSA Expenditure Category | TERM | | ency - 6/30/18 | | Agency 8 - 6/30/19 | l L | 7/1/17-6/30/19 |
| 11 | Rental of Property | | | | | | | |
| 12 | Telephone and Office Furniture | | | | | | · <u></u> | |
| | Program/Office Supplies | | \$ | 1,400 | \$ | 1,400 | \$ | 2,800 |
| | Utilities (Electricity, Water, Sewer, Gas, Phone) | | \$ | 1,800 | \$ | 1,800 | | 3,600 |
| | Printing and Reproduction | | \$ | 20 | \$ | 20 | <u> </u> | 40 |
| | Insurance | | * | | <u> </u> | | · <u></u> | |
| | Staff Travel (Local & Out of Town) | | \$ | 100 | \$ | 100 | \$ | 200 |
| | Law Library | | | 100 | | 100 | . <u> </u> | 230 |
| | Membership/Dues | | | | | | | |
| | Rental of Equipment | | | | | | | |
| | Senior Right Bulletin | | | | | | | |
| 22 | Sellor Right Bulletin | | | | | | | |
| | Staff Training | _ | \$ | 450 | \$ | 450 | \$ | 900 |
| | Sub-Contractor (NCPHS) | _ | \$ | 39,365 | \$ | 40,107 | \$ | 79,472 |
| | OTHER | | | | | | | |
| | Language Line Pangea/AASC Database | - | \$ | 800 | \$ | 800 | \$ | 1,600 |
| | Educational Programs | - - | | | | | · <u>-</u> | , |
| 29 | | _ | | | | | | |
| 30 | TOTAL LIGA OPERATING EVERNOR | | • | 40.005 | • | 44.077 | • | 00.040 |
| | TOTAL HSA OPERATING EXPENSE | | \$ | 43,935 | \$ | 44,677 | | 88,612 |
| 32 | Develop a Mattel On sertion Forest | | | | | | | |
| | Developer Match Operating Expense | | | | | | | |
| | Rental of Property | | | | | | | |
| | Telephone and Furniture | | | | | | - — | |
| | Office Supplies, Postage | | | | | | | |
| | Printing and Reproduction . | | | | | | <u> </u> | |
| | Insurance | | | | | | | |
| | Law Library | | | | | | <u> </u> | |
| | Membership/Dues | | | | | | | |
| | Rental of Equipment | | | | | | | |
| | Volunteer Expenses (Receptionist/intake) | | | | | | | |
| | Client Costs | | | | | | | |
| | Educational Programs | | | | | | | |
| | Charting | | | | | | | |
| | Staff Training | | | | | | · <u> </u> | |
| | Sub-Contractor (NCPHS) | | \$ | 55,970 | \$ | 56,915 | | 112,885 |
| 48 | | | • | | | | | |
| 49 50 | TOTAL DEVELOPER OPERATING EXPENSE | | \$ | 55,970 | \$ | 56,915 | | 112,885 |
| | TOTAL OPERATING EXPENSE | | • | 00.005 | • | | • | 204 407 |
| 51 52 | TOTAL OPERATING EXPENSE | | \$ | 99,905 | \$ | 101,592 | | 201,497 |

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. <u>Program Monitoring</u>: 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 | В | С | E | | | | | | |
|----------|--|--------------------------|----------------------|---------------------|--|--|--|--|--|--|
| 1 | ^ | Ь | | pendix B-3, Page 1 | | | | | | |
| 2 | | | | ment Date:4/18/2017 | | | | | | |
| | LILIMANI CERVICES ACENSY | CONTRACT DUD | | | | | | | | |
| 3 | HUMAN SERVICES AGENCY | | | | | | | | | |
| 4 | BY PROGRAM | | | | | | | | | |
| 5 | Contractor's Name | | Contract Term: | | | | | | | |
| 6 | BRIDGE Housing Corporation | | 7/1/2017 - 6/30/2019 | | | | | | | |
| 7 | (Check One) New RenewalX_ | Modification | 17 172017 070072010 | | | | | | | |
| | · , | Woullication | | | | | | | | |
| 8 | If modification, Effective Date of Mod. No. of | of Mod. | 1 | | | | | | | |
| | Dan was and Daniel Assistance Daniel and the distance of | File Otros (Mississ Dale | | | | | | | | |
| 9 | Program: Rental Assistance Demonstration - 18 | oth Street Mission Dold | ores | | | | | | | |
| 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 | | | | | | |
| | Operating Expense | \$57,519 | \$58,565 | \$116,084 | | | | | | |
| | Capital Expenditure | \$0 | \$0 | \$0 | | | | | | |
| <u> </u> | Subtotal | \$57,519 | \$58,565 | \$116,084 | | | | | | |
| . , | Indirect Percentage (%) | 12.00% | 10.00% | | | | | | | |
| | Indirect Cost (Line 16 X Line 17) | \$6,902 | \$5,856 | \$12,759 | | | | | | |
| | Total HSA Expenditures | \$64,421 | \$64,421 | \$128,842 | | | | | | |
| 20 | Developer Match Expenditures | | | | | | | | | |
| | Salaries & Benefits | \$0 | \$0 | \$0 | | | | | | |
| | Operating Expense | \$72,321 | \$73,636 | \$145,958 | | | | | | |
| | Capital Expenditure | \$0 | \$0 | \$0 | | | | | | |
| | Subtotal | \$72,321 | \$73,636 | \$145,958 | | | | | | |
| | Indirect Percentage (%) | 12.00% | 10.00% | | | | | | | |
| | Indirect Cost (Line 16 X Line 17) | \$8,679 | \$7,364 | \$16,043 | | | | | | |
| 27 | Total Developer Expenditures | \$81,000 | \$81,000 | \$162,000 | | | | | | |
| 28 | Tatal LICA and Davidon on Everan ditures | Ф4.4F.400 | Φ4.4E.4Ω4 | #200.042 | | | | | | |
| 29 | Total HSA and Developer Expenditures HSA Revenues | \$145,422 | \$145,421 | \$290,843 | | | | | | |
| 30 | 1 | COA 404 | 004.404 | # 400.040 | | | | | | |
| 31 | Local General Fund | \$64,421 | \$64,421 | \$128,842 | | | | | | |
| 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 | Total Developer Revenues | \$81,000 | \$81,000 | \$0 \$162,000 | | | | | | |
| | | | | | | | | | | |
| 46 | Total Revenues | \$145,421 | \$145,421 | \$290,842 | | | | | | |
| 47 | Full Time Equivalent (FTE) | 1.60 | | | | | | | | |
| | | Sucan Noufold | Tolophono No | Data 4/19/17 | | | | | | |
| 49 | Prepared by: | Susan Neufeld | Telephone No. | Date 4/18/17 | | | | | | |
| 50 | HSA-CO Review Signature: | | | | | | | | | |
| 51 | HSA #1 | | | | | | | | | |
| 52 | | | | | | | | | | |
| | <u> </u> | | | | | | | | | |

| | A B C | D | | E | F | G | НЈ | K |
|----------|---|-------------------|--------|-----------------------|----------|-------------------------|------------|-----------------------|
| 1 | | | | | | | D | Appendix B-3, Page 2 |
| 3 | | | | | | | Doc | ument Date: 4/18/2017 |
| 4 | Contractor's Name: BRIDGE Housing Corporat | ion | | | | | | |
| 5 | | | | | | | | |
| 7 | | Ope | rating | Expense | Detai | I | | |
| 8 | | | | | | | | |
| 9 | | | | an Services Agency | HU | ıman Services Agency | | TOTAL |
| 10 | HSA Expenditure Category | TERM | | 7 - 6/30/18 | 7, | /1/18 - 6/30/19 | _ | 7/1/17-6/30/19 |
| 11 | Rental of Property | | | | | | | |
| 12 | Telephone and Office Furniture | | | | | | . <u> </u> | |
| 13 | Program/Office Supplies | | | | | | | |
| 14 | Utilities (Electricity, Water, Sewer, Gas, Phone) | | \$ | 300 | \$ | 300 | \$ | 600 |
| 15 | Printing and Reproduction | | \$ | 20 | \$ | 20 | \$ | 40 |
| 16 | Insurance | | | | | | · <u>-</u> | |
| 17 | Staff Travel (Local & Out of Town) | | \$ | 100 | \$ | 110 | \$ | 210 |
| | Law Library | | | | | | | |
| | Membership/Dues | | | | | | | |
| | Rental of Equipment | | | | | | | |
| 21 | Senior Right Bulletin | | | | - | | | |
| 22 | Como ragin Bandan | | | | | | <u> </u> | |
| | | _ | | | | | _ | |
| | Sub-Contractor (NCPHS) | - | \$ | 55,499 | \$ | 56,535 | \$ | 112,034 |
| - | OTHER | | | | | | | |
| | Language Line Pangea/AASC Database | - | \$ | 1,600 | \$ | 1,600 | \$ | 3,200 |
| 28 | Educational Programs | - - | | 1,000 | | .,,,,, | | |
| 29 | | _ | | | | | _ | |
| 30 | | | | | | | _ | |
| 31 | TOTAL HSA OPERATING EXPENSE | | \$ | 57,519 | \$ | 58,565 | \$ | 116,084 |
| 32 | | | | | | | | |
| | | | | | | | | |
| 34 | Rental of Property | | | | | | _ | |
| 35 | Telephone and Furniture | | | | · — | | · <u> </u> | |
| 36 | Office Supplies, Postage | | | | | | _ | |
| 37 | Printing and Reproduction | | | | | | . <u> </u> | |
| 38 | Insurance | | | | | | . <u> </u> | |
| 39 | Law Library | | | | | | | |
| 40 | Membership/Dues | | | | | | | |
| 41 | Rental of Equipment | | | | <u> </u> | | . <u> </u> | |
| 42 | Volunteer Expenses (Receptionist/intake) | | | | | | | _ |
| 43 | Client Costs | | | | <u> </u> | | . <u> </u> | |
| 44 | Educational Programs | | | | <u> </u> | | . <u> </u> | |
| 45 | Charting | | | | | | | _ |
| 46 | Staff Training | | | | | | | _ |
| 47 | Sub-Contractor (NCPHS) | | \$ | 72,321 | \$ | 73,636 | \$ | 145,958 |
| 48 | | | | | | | | |
| | TOTAL DEVELOPER OPERATING EXPENSE | | \$ | 72,321 | \$ | 73,636 | \$ | 145,958 |
| 50 51 | TOTAL OPERATING EXPENSE | | \$ | 129,840 | \$ | 132,201 | \$ | 262,041 |
| 52 | | | Ψ | 120,040 | Ψ | 102,201 | _ ψ | 202,041 |
| 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. <u>Program Monitoring</u>: 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.

| | I A | В | С | E |
|----------|--|----------------------|----------------------|-----------------------|
| 1 | | | | Appendix B-4, Page 1 |
| 2 | | | | ment Date: 4/18/2017 |
| 3 | HUMAN SERVICES AGENCY | CONTRACT BUID | GET SLIMMARY | |
| 4 | TIOMAN SERVICES ACENCY | BY PROGRA | | |
| - | | BIFROGRA | | |
| 5 | Contractor's Name | | Contract Term: | |
| 6 | BRIDGE Housing Corporation | | 7/1/2017 - 6/30/2019 | |
| 7 | (Check One) New Renewal _X | Modification | | |
| | | | | |
| 8 | If modification, Effective Date of Mod. No. of | of Mod. | | |
| 9 | Program: Rental Assistance Demonstration - 29 | 5 Sanchaz | | |
| | | Janonez | | |
| | Budget Reference Page No.(s) | | | TOTAL |
| - | Program Term | 7/1/17 - 6/30/18 | 7/1/18 - 6/30/19 | 7/1/17-6/30/19 |
| 12 | 3, | | | |
| | Salaries & Benefits | \$0 | \$0 | \$0 |
| | Operating Expense | \$57,687 | \$58,697 | \$116,384 |
| | Capital Expenditure Subtotal | \$0 \$57,687 | \$0 \$58,697 | \$0 \$116,384 |
| | Indirect Percentage (%) | | | \$110,384 |
| | | 10.81% | 8.90% | ¢44.4F0 |
| - | Indirect Cost (Line 16 X Line 17) | \$6,234 | \$5,224 \$62,024 | \$11,458 \$127,842 |
| 20 | Total HSA Expenditures Developer Match Expenditures | \$63,921 | \$63,921 | \$127,842 |
| | Salaries & Benefits | \$0 | \$0 | \$0 |
| | Operating Expense | \$73,100 | \$74,380 | \$147,480 |
| | Capital Expenditure | \$73,100 | \$74,380 | \$147,480 |
| | Subtotal | \$73,100 | \$74,380 | \$147,480 |
| | Indirect Percentage (%) | | 8.90% | Ψ147,400 |
| | Indirect Cost (Line 16 X Line 17) | 10.81% \$7,900 | \$6,620 | \$14,520 |
| | Total Developer Expenditures | \$81,000 | \$81,000 | \$162,000 |
| 28 | Total Bovelopel Experialitates | ψο 1,000 | φο1,000 | Ψ102,000 |
| | Total HSA and Developer Expenditures | \$144,921 | \$144,921 | \$289,842 |
| 30 | HSA Revenues | ψ, <u>σ</u> | ψ,σ=. | Ψ=00,0 := |
| | Local General Fund | \$63,921 | \$63,921 | \$127,842 |
| 32 | 2000. 00110101111 | ψοσ,σΞ. | ψοσ,σ <u>=</u> : | Ψ:=:,σ:= |
| 33 | | | | |
| 34 | | | | |
| 35 | | | | |
| 36 | | | | |
| 37 38 | | | | |
| | TOTAL LICA DEVISABLES | # 00.00: | #00.00 <i>;</i> | # 407.010 |
| 39 | TOTAL HSA REVENUES | \$63,921 | \$63,921 | \$127,842 |
| 40 | Developer Revenues | 604 000 | #04.000 | #400.000 |
| 41 | Developer Match Funds | \$81,000 | \$81,000 | \$162,000 \$0 |
| 43 | | | | \$0 |
| 44 | | 1 | | \$0 |
| 45 | Total Developer Revenues | \$81,000 | \$81,000 | \$162,000 |
| 46 | Total Revenues | \$144,921 | \$144,921 | \$289,842 |
| | | | Ţ111,0Z1 | +-00,012 |
| 47 | Full Time Equivalent (FTE) | 1.60 | | |
| 49 | Prepared by: Susan Neufeld | Telephone No.: 415-3 | 321-3526 | Date 4/18/17 |
| | HSA-CO Review Signature: | | | |
| | | | | |
| | HSA #1 | | | |
| 52 | | | | |

| | A B C | D | | E | F | G | НЈ | K |
|----------|--|------|----------|-----------------------|----------|------------------------|-------------|-------------------|
| 1 | | | | | | | | endix B-4, Page 2 |
| 3 | | | | | | | Documen | t Date: 4/18/2017 |
| 4 | Contractor's Name: BRIDGE Housing Corporat | ion | | | | | | |
| 5 | | | | | | | | |
| 7 | | Ope | rating | Expense | Detail | | | |
| 8 | | | | | | | | |
| 9 | | | | an Services Agency | Hur | nan Services Agency | | TOTAL |
| 10 | HSA Expenditure Category | TERM | | 7 - 6/30/18 | 7/1 | /18 - 6/30/19 | 7/ | 1/17-6/30/19 |
| 11 | Rental of Property | | | | | | | |
| 12 | Telephone and Office Furniture | | | _ | | | | |
| 13 | Program/Office Supplies | | \$ | 1,400 | \$ | 1,400 | \$ | 2,800 |
| 14 | | | \$ | 155 | \$ | 155 | \$ | 310 |
| | Printing and Reproduction | | \$ | 40 | \$ | 40 | \$ | 80 |
| | Insurance | | <u> </u> | | | | | |
| | Staff Travel (Local & Out of Town) | | \$ | 200 | \$ | 200 | \$ | 400 |
| | Law Library | | Ψ | 200 | Ψ | 200 | Ψ | 400 |
| | Membership/Dues | | | | | | - | |
| | | | | | | | | |
| | Rental of Equipment | | | | | | | |
| 21 | Senior Right Bulletin | | | | | | | |
| 23 | Staff Training | | \$ | 745 | \$ | 745 | \$ | 1,490 |
| 24 | Sub-Contractor (NCPHS) | _ | \$ | 53,827 | \$ | 54,837 | \$ | 108,664 |
| 25 | OTHER | | | | | | | |
| 26 | Language Line | _ | | 4.000 | | 4.000 | | 0.040 |
| 27 28 | Pangea/AASC Database Educational Programs | _ | \$ | 1,320 | \$ | 1,320 | \$ | 2,640 |
| 29 | <u> </u> | _ | | | | | - | |
| 30 | | | | | | | | |
| 31 | TOTAL HSA OPERATING EXPENSE | | \$ | 57,687 | \$ | 58,697 | \$ | 116,384 |
| 32 | | | | | | | | |
| 33 | Developer Match Operating Expense | | | | | | | |
| 34 | Rental of Property | | | | | | | |
| 35 | Telephone and Furniture | | | | | | | |
| 36 | Office Supplies, Postage | | | | | | | |
| 37 | Printing and Reproduction | | | | | | | |
| | Insurance | | | | | | | |
| | Law Library | | | | | | | |
| | Membership/Dues | | | | | | | |
| 41 | Rental of Equipment | | | | | | | |
| | Volunteer Expenses (Receptionist/intake) | | | | | | | |
| 43 | | | | | | | - | |
| | Educational Programs | | | | | | | |
| | Charting | | | | | | - | |
| | | | | | | | | |
| 46 | | | • | 72 100 | e | 7/ 200 | • | 1/7 /00 |
| 47 | Sub-Contractor (NCPHS) | | \$ | 73,100 | \$ | 74,380 | \$ | 147,480 |
| 48 | TOTAL DEVELOPED OPERATING EVERYOR | | œ | 70.400 | Φ. | 74.000 | • | 447.400 |
| 49 50 | TOTAL DEVELOPER OPERATING EXPENSE | | \$ | 73,100 | \$ | 74,380 | \$ | 147,480 |
| 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. <u>Program Monitoring</u>: 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.

| | l A | В | С | E |
|----------|---|--|--|--|
| 1 | | | | Appendix B-5, Page 1 |
| 2 | | | | ment Date: 4/18/2017 |
| 3 | HUMAN SERVICES AGENCY | / CONTRACT BUIL | CET SHIMMARY | |
| 4 | HOWAN SERVICES AGENCY | BY PROGRA | | |
| <u> </u> | | BIFROGRA | | |
| 5 | Contractor's Name | | Contract Term: | |
| 6 | BRIDGE Housing Corporation | | | |
| 7 | (Check One) New Renewal _X | Modification | | |
| | _ | | | |
| 8 | If modification, Effective Date of Mod. No. of | of Mod. | | |
| 9 | Program: Rental Assistance Demonstration - 25 | 55 Woodside | | |
| | _ | VVOCASIAC | | |
| | Budget Reference Page No.(s) | | | TOTAL |
| | 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 | | | |
| | Salaries & Benefits | \$0 | \$0 | \$0 |
| | Operating Expense | \$81,935 | \$83,099 | \$165,034 |
| | Capital Expenditure Subtotal | \$0 \$81,935 | \$0 \$83,099 | \$0 \$165,034 |
| | Indirect Percentage (%) | | | φ100,03 4 |
| | Indirect Percentage (%) Indirect Cost (Line 16 X Line 17) | 14.00% \$11,471 | 12.40% \$10,308 | \$21,778 |
| - | , | | \$10,308 | |
| 20 | Total HSA Expenditures Developer Match Expenditures | \$93,406 | φ 9 3, 4 06 | \$186,812 |
| 21 | Salaries & Benefits | \$0 | \$0 | \$0 |
| - | Operating Expense | \$71,053 | \$72,061 | \$143,114 |
| | Capital Expenditure | \$0 | \$0 | \$143,114 |
| | Subtotal | \$71,053 | \$72,061 | \$143,114 |
| | Indirect Percentage (%) | 14.00% | 12.40% | Ψ110,111 |
| | Indirect Cost (Line 16 X Line 17) | \$9,947 | \$8,939 | \$18,886 |
| 27 | , , | \$81,000 | \$81,000 | \$162,000 |
| 28 | Total Bovolopol Expolicitation | ψ01,000 | φοι,σσσ | Ψ102,000 |
| 29 | Total HSA and Developer Expenditures | \$174,406 | \$174,406 | \$348,812 |
| 30 | HSA Revenues | 1 | ¥ · · · · · · · · · · · · · · · · · · · | + |
| 31 | Local General Fund | \$93,406 | \$93,406 | \$186,812 |
| 32 | | + + + + + + + + + + + + + + + + + + + | 400,100 | * *********************************** |
| 33 | | | | |
| 34 | | | | |
| 35 | | | | |
| 36 | | | | |
| 37 38 | | | | |
| | TOTAL LIGA DEVENUES | # 00 400 | # 00 400 | #400 040 |
| 39 | TOTAL HSA REVENUES | \$93,406 | \$93,406 | \$186,812 |
| 40 | Developer Revenues | #04.000 | #04.000 | #400.000 |
| 41 42 | Developer Match Funds | \$81,000 | \$81,000 | \$162,000 \$0 |
| 43 | | | | \$0 \$0 |
| 44 | | | | \$0 |
| 45 | Total Developer Revenues | \$81,000 | \$81,000 | \$162,000 |
| 46 | Total Revenues | \$174,406 | \$174,406 | \$348,812 |
| | | | ψ17 1,100 | Ψ510,012 |
| 47 | | 1.80 | | |
| 49 | Prepared by: Susan Neufeld | Telephone No.: 415-3 | 21-3526 | Date 4/18/17 |
| 50 | HSA-CO Review Signature: | | | |
| 51 | HSA #1 | | | |
| 52 | | | | |
| | • | | | |

| Document D Contractor's Name: BRIDGE Housing Corporation Contractor's Name: BRIDGE Housing Corporation Operating Expense Detail Human Services Agency Human Services Agency Telephone Telephone | DTAL 7-6/30/19 3,182 2,600 80 |
|--|-------------------------------|
| 3 4 5 6 7 | 3,182 2,600 80 |
| Compariting Expense Detail Fig. Compariting Expense Detail | 3,182 2,600 80 |
| Comparing Expense Detail Comparing Expense D | 3,182 2,600 80 |
| Human Services Agency Total Human Services Total Hum | 3,182 2,600 80 |
| Human Services Agency TERM 7/1/17 - 6/30/18 7/1/18 - 6/30/19 7/1/17 | 3,182 2,600 80 |
| 10 HSA Expenditure Category TERM 7/1/17 - 6/30/18 7/1/18 - 6/30/19 7/1/17 11 Rental of Property | 3,182 2,600 80 |
| 11 Rental of Property | 3,182 2,600 80 |
| Telephone and Office Furniture 13 Program/Office Supplies \$ 1,523 \$ 1,659 \$ \$ \$ \$ \$ \$ \$ \$ \$ | 2,600 |
| 13 Program/Office Supplies \$ 1,523 | 2,600 |
| 14 Utilities (Electricity, Water, Sewer, Gas, Phone) | 2,600 |
| 15 | 80 |
| Insurance Staff Travel (Local & Out of Town) \$ 200 | |
| Staff Travel (Local & Out of Town) \$ 200 | 400 |
| 18 Law Library 19 Membership/Dues 20 Rental of Equipment 21 Senior Right Bulletin 22 3 Staff Training \$ 900 \$ 900 \$ 24 Sub-Contractor (NCPHS) \$ 76,372 \$ 77,400 \$ 25 OTHER 26 Language Line 27 Pangea/AASC Database \$ 1,600 \$ 1,600 \$ 28 Educational Programs 29 30 30 31 TOTAL HSA OPERATING EXPENSE \$ 81,935 \$ 83,099 \$ | 400 |
| 19 Membership/Dues 20 Rental of Equipment 21 Senior Right Bulletin 22 3 Staff Training \$ 900 \$ 900 \$ 24 Sub-Contractor (NCPHS) \$ 76,372 \$ 77,400 <t< td=""><td></td></t<> | |
| 20 Rental of Equipment 21 Senior Right Bulletin 22 2 3 Staff Training \$ 900 \$ 900 \$ 24 Sub-Contractor (NCPHS) \$ 76,372 \$ 77,400 \$ 25 OTHER 26 Language Line 27 Pangea/AASC Database \$ 1,600 \$ 1,600 \$ 28 Educational Programs 29 30 31 TOTAL HSA OPERATING EXPENSE \$ 81,935 \$ 83,099 \$ | |
| 21 Senior Right Bulletin 22 \$ 900 \$ 900 \$ 24 Sub-Contractor (NCPHS) \$ 76,372 \$ 77,400 \$ 25 OTHER 26 Language Line 27 Pangea/AASC Database \$ 1,600 \$ 1,600 \$ 28 Educational Programs 29 30 31 TOTAL HSA OPERATING EXPENSE \$ 81,935 \$ 83,099 \$ | |
| 22 23 Staff Training \$ 900 \$ 900 24 Sub-Contractor (NCPHS) \$ 76,372 \$ 77,400 25 OTHER 26 Language Line 27 Pangea/AASC Database \$ 1,600 \$ 1,600 28 Educational Programs 29 30 31 TOTAL HSA OPERATING EXPENSE \$ 81,935 \$ 83,099 | |
| 23 Staff Training \$ 900 \$ 900 24 Sub-Contractor (NCPHS) \$ 76,372 \$ 77,400 25 OTHER 26 Language Line 27 Pangea/AASC Database \$ 1,600 \$ 1,600 28 Educational Programs 29 30 31 TOTAL HSA OPERATING EXPENSE \$ 81,935 \$ 83,099 \$ | |
| 25 OTHER 26 Language Line 27 Pangea/AASC Database \$ 1,600 \$ 1,600 28 Educational Programs 29 30 31 TOTAL HSA OPERATING EXPENSE \$ 81,935 \$ 83,099 | 1,800 |
| 26 Language Line 27 Pangea/AASC Database \$ 1,600 \$ 1,600 \$ 28 Educational Programs 29 30 30 31 TOTAL HSA OPERATING EXPENSE \$ 81,935 \$ 83,099 \$ \$ 30,099 | 153,772 |
| 27 Pangea/AASC Database \$ 1,600 \$ 1,600 \$ 28 Educational Programs 29 30 31 TOTAL HSA OPERATING EXPENSE \$ 81,935 \$ 83,099 \$ | |
| 28 Educational Programs 29 30 31 TOTAL HSA OPERATING EXPENSE \$ 81,935 \$ 83,099 \$ | 3,200 |
| 29 | 3,200 |
| 31 TOTAL HSA OPERATING EXPENSE \$ 81,935 \$ 83,099 \$ | |
| <u> </u> | |
| 32 | 165,034 |
| | |
| 33 Developer Match Operating Expense | |
| Rental of Property | |
| Telephone and Furniture | |
| Office Supplies, Postage | |
| Printing and Reproduction | |
| 38 Insurance | |
| Law Library | |
| 40 Membership/Dues | |
| Rental of Equipment | |
| Volunteer Expenses (Receptionist/intake) | |
| 43 Client Costs | |
| 44 Educational Programs | |
| 45 Charting | |
| 46 Staff Training | |
| 47 Sub-Contractor (NCPHS) <u>\$ 71,053</u> <u>\$ 72,061</u> <u>\$</u> | |
| 48 | 143,114 |
| 49 TOTAL DEVELOPER OPERATING EXPENSE | |
| 51 TOTAL OPERATING EXPENSE \$ 152,988 \$ 155,160 \$ | 143,114 |
| 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. <u>Program Monitoring</u>: 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.

| | l A | В | С | F |
|----------|--|-----------------------|---------------------|------------------------|
| 1 | | | | Appendix B-1, Page 1 |
| 2 | | | Do | cument Date: 4/20/2017 |
| 3 | HUMAN SERVICES | AGENCY BUDG | ET SUMMARY | |
| 4 | | BY PROGR | | |
| 5 | Name | | | |
| 6 | Chinatown Community Development | Center | | |
| 7 | (Check One) New 🗌 Renewa | I <u>X</u> Modificati | ion | |
| 8 | If modification, Effective Date of Mod | I. No. of Mod. | | |
| 9 | Program: Rental Assistance Hous | sing Support Servic | es - 227 Bay St. | TOTAL |
| 10 | Budget Reference Page No.(s) | | | |
| | 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 |
| | Subtotal | \$44,192 | \$44,192 | \$88,384 |
| 16 | Indirect Percentage (%) | 13% | | |
| | 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 | | | | |
| | TOTAL HSA REVENUES | \$49,937 | \$49,937 | \$99,874 |
| 30 | Other Revenues | | | |
| 31 | | | | |
| 32 | | | | |
| 33 | | | | |
| 34 | | | | |
| | Total Revenues | \$49,937 | \$49,937 | \$99,874 |
| 37 | Full Time Equivalent (FTE) | ψ.σ,σσ <i>i</i> | \$.5,50 | 400,011 |
| | Prepared by: Joseph Fu | Telephone No.: 415 | 5-984-1 <i>4</i> 87 | Date: 4/20/2017 |
| | HSA-CO Review Signature: | Totophone No.: 410 | 7 004 1401 | DUIG. 7/20/2011 |
| | _ | | | 4414510007 |
| 41 | HSA #1 | | | 11/15/2007 |

| | А | В | С | D | E | F | G | J |
|----------|----------------------------------|-----------------------|----------------|------------|-----------------|-----------------|-----------------|-----------------------|
| 1 | | | | | | | | Appendix B-1, Page 2 |
| 3 | | | | | | | Doc | ument Date: 4/20/2017 |
| | Program: Rental Assistance House | sing Support Se | ervices - 22 | 27 Bay St. | | | | |
| 5 | (Same as Line 9 on HSA #1) | | | | | | | |
| 6 | | | | | | | | |
| 7 | | | Salarie | es & Benef | its Detail | | | |
| 8 | | | | | | | | |
| 9 10 | | | | | | 7/1/17-6/30/18 | 7/1/18-6/30/19 | |
| 11 | | Agency 7 | Totals | For HSA | Program | | For DHS Program | TOTAL |
| | | Annual Full | | | | | | - |
| 12 | POSITION TITLE | TimeSalary 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 | FRINGE BENEFIT RATE | 32.000% | | | | | | |
| | EMPLOYEE FRINGE BENEFITS | | | | | 8,494 | 8,494 | \$16,988 |
| 34 35 | | | | | | | | |
| | TOTAL SALARIES & BENEFITS | \$0 | | | | 35,038 | 35,038 | \$70,076 |
| 37 | HSA #2 | | | | | | | 11/15/2007 |

| | Α | В | С | D | E | F | G | ΗL | | М |
|----------|-------------------|----------------|------------------|---------|-------------------|------|----------------|-------|---------|---------------|
| 1 | | | | | | | | Appe | ndix B | -1, Page 3 |
| 2 | | | | | | | D | ocume | ent Dat | te: 4/20/2017 |
| 3 | | | | | | | | | | |
| | | | | ort Ser | vices - 227 Bay S | St. | | | | |
| 5 6 | (Same as Line | 9 on HSA #1) | | | | | | | | |
| 7 | | | | One | rating Expens | se C | Detail | | | |
| 8 | | | | Оро | ating Expond | - | otan | | | |
| 9 | | | | | | | | | | |
| 10 | | | | | | | | | | |
| 11 | | | | | | | | | | TOTAL |
| 12 | Expenditure C | ategory | | TERM | 7/1/17-6/30/18 | - | 7/1/18-6/30/19 | | 7/1/1 | 7 - 6/30/19 |
| 13 | Rental of Prop | erty | | | \$1,000 | - | \$1,000 | | \$ | 2,000 |
| 14 | Utilities(Elec, V | Water, Gas, Pl | none, Scavenge | er) | \$600 | | \$600 | | \$ | 1,200 |
| 15 | Office Supplie | s, Postage | | | \$500 | | \$500 | | \$ | 1,000 |
| 16 | Building Maint | enance Suppli | es and Repair | | | | | | | |
| 17 | Printing and R | eproduction | | | | - | | | | |
| 18 | Insurance | | | | | | | | | |
| 19 | Staff Training | | | | | | | | | |
| 20 | Staff Travel-(L | ocal & Out of | Γown) | | \$250 | | \$250 | | \$ | 500 |
| 21 | Rental of Equi | pment | | | | | | | | |
| 22 | CONSULTANT/S | UBCONTRACTOR | R DESCRIPTIVE TI | TLE | | | | | | |
| - | Clinical Consu | Iltation Fees | | | | _ | | | | |
| 24 | | | | ı | | - | | | | |
| 25 | | | | ı | | - | | | | |
| 26 | | | | ı | | - | | | | |
| 27 | | | | ı | | - | | | | |
| \vdash | OTHER | | | | | | | | | |
| | Job Posting Fo | | | | | - | | | | |
| | | nagement sub | scription | ı | | - | | | | |
| | Meeting exper | | | • | | - | | | | |
| | | : computer ser | vicing | ı | | - | | | | |
| | Janitorial | | | ı | * | - | ^- | | • | 10.000 |
| 34 | Tenant Activiti | es | | ı | \$6,804 | - | \$6,804 | | \$ | 13,608 |
| 35 | TOTAL ODED | ATING EVEC | JOE | | ФО 4 <i>Е</i> 4 | | #0.454 | | | £40.000 |
| | TOTAL OPER | ATING EXPEN | N9E | | \$9,154 | - | \$9,154 | | | \$18,308 |
| 37 | | | | | | | | | | 44/45/225 |
| 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. <u>Program Monitoring</u>: 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.

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|----------|---|---|-----------------------|---|--|--|--|--|--|--|
| 2 | | | | Appendix B-2, Page 1 ment Date: 4/20/2017 | | | | | | |
| 3 | HUMAN SERVICES | AGENCY BUDG | ET SUMMARY | | | | | | | |
| 4 | | BY PROGR | AM | | | | | | | |
| 5 | Name | | | | | | | | | |
| 6 | Chinatown Community Developmen | t Center | | | | | | | | |
| 7 | (Check One) New 🗌 Renewa | al <u>X</u> Modification | on | | | | | | | |
| 8 | If modification, Effective Date of Mo | | | | | | | | | |
| ^ | Program: Rental Assistance Housing Support Services - 990 Pacific | | | | | | | | | |
| 9 | Ave | 1 | | TOTAL | | | | | | |
| | Budget Reference Page No.(s) | | | | | | | | | |
| | Program Term | 7/1/17 - 6/30/18 | 7/1/18 - 6/30/19 | 7/1/17 - 6/30/19 | | | | | | |
| 12 | Expenditures | | | | | | | | | |
| | Salaries & Benefits | \$93,659 | \$93,659 | \$187,318 | | | | | | |
| | Operating Expense Subtotal | \$27,911 \$121.570 | \$27,911 \$121,570 | \$55,822 \$243.140 | | | | | | |
| | Indirect Percentage (%) | , | | , -, - | | | | | | |
| | Indirect Cost (Line 16 X Line 15) | 13% \$15,804 | 13% \$15,804 | 13% \$31.608 | | | | | | |
| | Capital Expenditure | \$15,804 | \$15,804 | \$31,608 | | | | | | |
| | Total Expenditures | \$137,374 | \$137,374 | \$274,748 | | | | | | |
| 0 | | Ψ151,514 | ψ157,574 | Ψ214,140 | | | | | | |
| | Local General Fund | \$137,374 | \$137,374 | \$274,748 | | | | | | |
| 22 | Essar Serierar i una | Ψ101,014 | Ψ101,014 | Ψ214,140 | | | | | | |
| 23 | | | | | | | | | | |
| 24 | | | | | | | | | | |
| 25 | | | | | | | | | | |
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| 27 | | | | | | | | | | |
| 28 | | Φ4Ω7Ω74 | Ф407 074 | 6074 740 | | | | | | |
| | TOTAL HSA REVENUES | \$137,374 | \$137,374 | \$274,748 | | | | | | |
| 30 31 | Other Revenues | | | | | | | | | |
| 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 | В | С | D | Е | F | G | J | | | | |
|----------|---|----------------|-----------------------------------|---------------|------------|-----------------|-----------------|--|--|--|--|--|
| 1 | | | | | | | | opendix B-2, Page 2 ent Date: 4/20/2017 | | | | |
| 3 | | | | | | | Docum | ent Date. 4/20/2017 | | | | |
| 4 5 | Program: Rental Assistance Hous (Same as Line 9 on HSA #1) | sing Support S | ervices - 9 | 90 Pacific Av | е | | | | | | | |
| 6 | (Same as Line 9 on HSA #1) | | | | | | | | | | | |
| 7 | | | Salari | es & Benef | ite Dotail | | | | | | | |
| 8 | | | Jaiani | os a Dellei | its Detail | | | | | | | |
| 9 | | | | | | | | | | | | |
| 10 | | | 7/1/17 - 6/30/18 7/1/18 - 6/30/19 | | | | | | | | | |
| 11 | | Agency 1 | otals | For HSA | Program | For HSA Program | For DHS Program | TOTAL | | | | |
| | | TimeSalary | Total % | | Adjusted | | | | | | | |
| 12 | POSITION TITLE | for FTE | FTE | % FTE | FTE | Budgeted Salary | Budgeted Salary | 7/1/12 to 6/30/16 | | | | |
| 13 | Resident Services Coordinator SR. Resident Services | \$41,475 | 100% | 80.00% | 80.00% | \$33,180 | \$33,180 | \$66,360 | | | | |
| 14 | Coordinator | \$49,774 | 100% | 60.00% | 60.00% | \$29,865 | \$29,865 | \$59,729 | | | | |
| 15 | Health Services Supervisor | \$58,604 | 100% | 10.00% | 10.00% | \$5,860 | \$5,860 | \$11,721 | | | | |
| 16 | Resident Services Assistant | \$40,976 | 100% | 5.00% | 5.00% | \$2,049 | \$2,049 | \$4,098 | | | | |
| 47 | | | | | | | | ФО. | | | | |
| 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 | | 4.00 | 1.55 | 1.55 | 70,954 | 70,954 | \$141,908 | | | | |
| 31 32 | FRINGE BENEFIT RATE | 32.000% | | | | | | | | | | |
| 33 | EMPLOYEE FRINGE BENEFITS | | | | | 22,705 | 22,705 | \$45,410 | | | | |
| 34 | | | | | | , • | , | · -, · · | | | | |
| 35 36 | TOTAL SALARIES & BENEFITS | \$0 | | | | 93,659 | 93,659 | \$187,318 | | | | |
| | HSA #2 | Ψ0 | | | | 55,550 | 20,230 | 11/15/2007 | | | | |

| | Α | В | С | D | Е | F | G | HL | | М |
|---------------|---------------------------|------------------|----------------|------------|--------------------|----------|------------------|----------|--------|-------------|
| 1 | | | | | | | | Apper | ndix I | 3-2, Page 2 |
| 2 | | | | | | | | | | |
| 3 | _ | | | _ | | | | | | |
| <u>4</u> 5 | Program: Re (Same as Line | | | port Ser | vices - 990 Pacifi | ic Ave | € | | | |
| 6 | (Same as Line | ; 9 UH HOA #1) | • | | | | | | | |
| 7 | Ī | | | Ope | rating Expens | se D | etail | | | |
| 8 |] | | | - | | | | | | |
| 9 | } | | | | | | | | | |
| 10 11 | ł | | | | | | | | | TOTAL |
| _ | Expenditure C | ategor <u>y</u> | | TERM | 7/1/17 - 6/30/18 | 7 | 7/1/18 - 6/30/19 | <u> </u> | | 7 - 6/30/19 |
| 13 | Rental of Prop | erty | | | \$5,000 | _ | \$5,000 | | \$ | 10,000.00 |
| 14 | Utilities(Elec, \ | Water, Gas, Pl | hone, Scaveng | jer) | \$2,500 | _ | \$2,500 | | \$ | 5,000.00 |
| 15 | Office Supplie | s, Postage | | | \$2,800 | <u> </u> | \$2,800 | | \$ | 5,600.00 |
| 16 | Building Maint | enance Suppli | es and Repair | | | _ | | | | |
| 17 | Printing and R | eproduction | | | \$100 | _ | \$100 | | \$ | 200.00 |
| 18 | Insurance | | | | | _ | | | | |
| 19 | Staff Training | | | | \$1,000 | _ | \$1,000 | | \$ | 2,000.00 |
| 20 | Staff Travel-(L | ocal & Out of | Town) | | \$1,000 | _ | \$1,000 | | \$ | 2,000.00 |
| 21 | Rental of Equi | pment | | | \$1,200 | _ | \$1,200 | _ | \$ | 2,400.00 |
| | CONSULTANT/S | | | | | | | | | |
| | Professional S | Services for ter | ant relocation | activitie: | \$4,000 | _ | | | \$ | 4,000.00 |
| 24 | | | | _ | | _ | | | | |
| 25 26 | | | | _ | | _ | | | | |
| 27 | | | | _ | | _ | | | | |
| 28 | OTHER | | | _ | | _ | | | | |
| 29 | Job Posting Fe | ees | | _ | | <u> </u> | | _ | | |
| | Dues/data ma | | scription | _ | | _ | | | | |
| | Meeting exper | | | _ | \$250 | _ | \$250 | | \$ | 500.00 |
| | MIS expenses | : computer sei | rvicing | _ | * | _ | *** | | Φ. | 4.000.00 |
| | Janitorial | 00 | | _ | \$900 \$0.161 | _ | \$900 | _ | \$ | 1,800.00 |
| 34 35 | Tenant Activiti | es | | _ | \$9,161 | _ | \$13,161 | | \$ | 22,322.00 |
| 36 | TOTAL OPER | ATING EXPE | NSF | | \$27,911 | | \$27,911 | | | \$55,822 |
| 37 | 10171201210 | ATTING EAT E | .02 | | Ψ21,011 | | Ψ21,011 | | | ΨΟΟ,ΟΖΖ |
| | UCV #3 | | | | | | | | | 44/4E/2027 |
| 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. <u>Program Monitoring</u>: 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. <u>Fiscal Compliance and Contract Monitoring</u>: 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.

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|----|--|----------------------|---------------------------------|----------------------|
| 1 | | | Арр | endix B-1, Page 1 |
| 2 | | | Docur | ment Date: 5/25/2017 |
| 3 | HUMAN SERVICES AGE | NCY BUDGET S | UMMARY | |
| 4 | | BY PROGR | _ | |
| 5 | Name | | Contract Term: | |
| 6 | Community Housing Partnership | | 6/1/2017 - 7/30/20 ⁻ | 19 |
| 7 | (Check One) New Renewal X | Modification | _ | |
| 8 | If modification, Effective Date of Mod. | No. of Mod. | | |
| 9 | Program: Rental Assistance Demonstration | on - 1750 McAllister | | |
| 10 | Budget Reference Page No.(s) | | | |
| | Program Term | 7/1/17-6/30/18 | 7/1/18-6/30/19 | Total |
| 12 | Expenditures | 771717-0/30/10 | 7/1/10-0/30/19 | Total |
| | Salaries & Benefits | \$49,777 | \$49,777 | \$99,554 |
| | Operating Expense | \$8,339 | \$8,339 | \$16,679 |
| | Subtotal | \$58,116 | \$58,116 | \$116,232 |
| | Indirect Percentage (%) | | | Ψ110,202 |
| _ | Indirect Cost (Line 16 X Line 15) | 13% \$7,555 | 13% \$7,555 | \$15,110 |
| | Capital Expenditure | \$0 | \$0 | \$13,110 |
| | Total Expenditures | \$65,671 | \$65,671 | \$131,342 |
| 20 | HSA Revenues | φου,σ7 ι | φ05,071 | \$131,342 |
| | | ФОГ 074 | ФСE 074 | #404.040 |
| 22 | Local General Fund | \$65,671 | \$65,671 | \$131,342 |
| 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 | | | | |
| | Prepared by: Kani Lin, Controller | Telephone No.: 415 | -852-5322 | Date: 4/18/17 |
| | | Tolephone No., 413 | 002-0022 | Dute. 7/10/11 |
| | HSA-CO Review Signature: | | | |
| 41 | HSA #1 | | | 5/25/2017 |

| | A | | В | С | D | Е | | F | G | ı |
|----------|----------------------------|--|-----------|--------|------------|------------|-----|--------------|-----------------|-------------------|
| 1 | | | | | | | | | | endix B-1, Page 2 |
| 2 | | | | | | | | | | Date: 5/25/17 |
| 3 | | | | | | | | | | |
| 4 | Program Name: | | | | | | | | | |
| 5 | (Same as Line 9 on HSA #1) | | | | | | | | | |
| 6 | | | | | | | | | | |
| 7 | | | | Salari | es & Benef | its Detail | | | | |
| 8 | | | | | | | | | | |
| 9 | | | | | | | | | | |
| 10 | 1 | | | | | | 7/1 | /17-6/30/18 | 7/1/18-6/30/19 | |
| 11 | ' | | Agency 7 | Totals | HSA Pr | oaram | | dS Program | DHS Program | TOTAL |
| | · | | Agency | Otais | % FTE | ogram | " | 10 i Togram | DiloTiogiani | TOTAL |
| | | An | nual Full | | funded by | | | | | |
| | · | Tin | neSalary | Total | HSA | Adjusted | | | | |
| 12 | POSITION TITLE | fe | or FTE | FTE | (Max 100%) | FTE | Bud | geted Salary | Budgeted Salary | 7/1/17 to 6/30/19 |
| 13 | Clinical Case Manager | \$ | 47,280 | 1.00 | 25% | 0.25 | \$ | 11,820 | \$ 11,820 | \$ 23,640 |
| 14 | Resident Service Counselor | \$ | 36,776 | 1.00 | 25% | 0.25 | \$ | 9,194 | \$ 9,194 | \$ 18,388 |
| 15 | Resident Service Team Lead | \$ | 58,576 | 1.00 | 30% | 0.30 | \$ | 17,573 | \$ 17,573 | \$ 35,146 |
| 16 | | | | | | | | | | |
| 17 | | | | | | | | | | |
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| 27 | | | | | | | | | | |
| 28 | | | | | | | | | | |
| 29 | | | | | | | | | | |
| 30 | TOTALS | | | 3.00 | 80% | 0.80 | \$ | 38,587 | \$ 38,587 | \$ 77,174 |
| 31 | | | | | | | | | | |
| 32 | FRINGE BENEFIT RATE | <u> </u> | 29% | | | | | | | <u></u> |
| 33 | EMPLOYEE FRINGE BENEFITS | | | | | | \$ | 11,190 | \$ 11,190 | \$ 22,380 |
| 34 | | | <u> </u> | | | | | · | · | · · |
| 35 | | | | | | | | | | |
| 36 | TOTAL SALARIES & BENEFITS | | \$0 | | | | \$ | 49,777 | \$ 49,777 | \$ 99,554 |
| 37 | HSA #2 | | | | | | | | | 10/25/2016 |

| | Α | В | С | D | | E | F | | J | K |
|----------|-------------------|----------------------|---------------|------|-------|-----------|--------|------------|----|-------------|
| 1 | | | | | | | | Appe | | 1, Page 3 |
| 2 | | | | | | | | | Da | te: 5/25/17 |
| 3 | | | | | | | | | | |
| 5 | Program Nam | e: e 9 on HSA #1) | | | | | | | | |
| 6 | (Same as Line | 9 011 113A #1) | | | | | | | | |
| 7 | | | | Ope | ratin | g Expens | e Deta | il | | |
| 8 | | | | - | | | | | | |
| 9 | | | | | | | | | | |
| 10 11 | | | | | | | | | , | TOTAL |
| 12 | Expenditure C | ategory | | TERM | 7/1/1 | 7-6/30/18 | 7/1/ | 18-6/30/19 | | 17-6/30/19 |
| 13 | Rental of Prop | erty | | | \$ | 130 | \$ | 130 | \$ | 261 |
| 14 | Utilities(Elec, \ | Water, Gas, Ph | none, Scaveng | er) | \$ | 1,537 | \$ | 1,537 | \$ | 3,073 |
| 15 | Office Supplie | s, Postage | | | \$ | 809 | \$ | 809 | \$ | 1,619 |
| 16 | Building Maint | enance Suppli | es and Repair | | \$ | 1,065 | \$ | 1,065 | \$ | 2,131 |
| 17 | Printing and R | eproduction | | | \$ | 745 | \$ | 745 | \$ | 1,490 |
| 18 | Insurance | | | | \$ | 155 | \$ | 155 | \$ | 310 |
| 19 | Staff Training | | | | \$ | 569 | \$ | 569 | \$ | 1,138 |
| 20 | Staff Travel-(L | ocal & Out of 7 | Town) | | \$ | 150 | \$ | 150 | \$ | 300 |
| 21 | Rental of Equi | pment | | | \$ | 1,840 | \$ | 1,840 | \$ | 3,679 |
| 22 | CONSULTANT/S | UBCONTRACTOR | DESCRIPTIVE T | TTLE | | | | | | |
| 23 | Professional S | Service | | _ | | | | | | |
| 24 | | | | _ | | | | | | |
| 25 26 | | | | _ | | | | | | |
| 27 | | | | _ | | | | | | |
| 28 | OTHER | | | _ | | | | | | |
| 29 | Payroll Expens | ses | | _ | \$ | 159 | \$ | 159 | \$ | 319 |
| 30 | | | | _ | \$ | 127 | \$ | 127 | \$ | 254 |
| 31 | Office Equipm | ent Repair (IT | Support) | _ | \$ | 328 | \$ | 328 | \$ | 656 |
| 32 | | I Activities (sta | ff) | _ | | | | | | |
| 33 | Tenant Projec | ts/Activities | | _ | \$ | 725 | \$ | 725 | \$ | 1,450 |
| 34 | | | | | | | | | | |
| 35 | TOTAL OPER | ATING EXPEN | ISE | | \$ | 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. <u>Program Monitoring</u>: 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.

| Appendix B-2, Page 1 Document Date: 5/25/2017 | | A | | В | С | | E |
|--|----------|-----------------------------------|-------------|--------------|-------------------|--------|----------------|
| A | 1 | Λ | | | | ppen | |
| BY PROGRAM | 2 | | | | | | |
| BY PROGRAM | 3 | HUMAN SERVICES AGE | NCY E | SUDGET S | UMMARY | | |
| Community Housing Partnership 7/1/2017 - 6/30/2019 Check One New | <u> </u> | | | | | | |
| 7 (Check One) New ☐ Renewal X Modification ☐ 8 If modification, Effective Date of Mod. No. of Mod. 9 Program: 666 Ellis Total 10 Budget Reference Page No.(s) 7/1/17-6/30/18 7/1/18-6/30/19 7/1/17-6/30/19 12 Expenditures \$ 48,725 \$ 48,725 \$ 97,450 12 Expenditures \$ 9,032 \$ 9,032 \$ 18,064 15 Subtotal \$ 57,757 \$ 57,757 \$ 115,514 16 Indirect Percentage (%) 15% 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 \$ 66,421 \$ 66,421 \$ 132,842 21 General Fund \$ 66,421 \$ 66,421 \$ 132,842 22 TOTAL HSA REVENUES \$ 66,421 \$ 66,421 \$ 132,842 | 5 | Name | | | Contract Term: | | |
| 7 (Check One) New ☐ Renewal X Modification ☐ 8 If modification, Effective Date of Mod. No. of Mod. 9 Program: 666 Ellis Total 10 Budget Reference Page No.(s) 7/1/17-6/30/18 7/1/18-6/30/19 7/1/17-6/30/19 12 Expenditures \$ 48,725 \$ 48,725 \$ 97,450 12 Expenditures \$ 9,032 \$ 9,032 \$ 18,064 15 Subtotal \$ 57,757 \$ 57,757 \$ 115,514 16 Indirect Percentage (%) 15% 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 \$ 66,421 \$ 66,421 \$ 132,842 21 General Fund \$ 66,421 \$ 66,421 \$ 132,842 22 TOTAL HSA REVENUES \$ 66,421 \$ 66,421 \$ 132,842 | 6 | Community Housing Partnership | | | 7/1/2017 - 6/30/2 | 2019 | |
| Box If modification, Effective Date of Mod. No. of Mod. | | | Modi | fication | | | |
| Program: 666 Ellis | 8 | · | | | _ | | |
| Total Program Term Total Total Program Term Total Program Term Total Program Term Total Total Program Term Total Total Total Program Term Total To | | | | | | | |
| 11 | | | | | | | Total |
| 12 Expenditures | | | 7/1/1 | 7 6/20/10 | 7/1/19 6/20/10 | | |
| 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 \$ 132,842 30 Other Revenues 31 32 33 | | | 7/1/1 | 1-0/30/10 | 7/1/10-0/30/18 | | 7/1/17-0/30/19 |
| 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 17 Total Expenditures \$ 66,421 \$ 66,421 \$ 132,842 20 HSA Revenues | _ | - | \$ | 48 725 | \$ 48.72 | 5 \$ | 97 450 |
| 15 Subtotal | | | | | | | |
| 17 | 15 | Subtotal | | | | _ | , |
| 17 | 16 | Indirect Percentage (%) | | 15% | 15 | % | |
| 18 Capital Expenditure \$ - \$ - \$ - \$ - 19 Total Expenditures \$ 66,421 \$ 66,421 \$ 132,842 \$ 132,842 \$ 66,421 \$ 132,842 \$ 132,842 <td>_</td> <td></td> <td>\$</td> <td></td> <td></td> <td></td> <td>17,328</td> | _ | | \$ | | | | 17,328 |
| 19 Total Expenditures \$ 66,421 \$ 66,421 \$ 132,842 | | , | | - | | | |
| Common | | | \$ | 66,421 | \$ 66,42 | 1 \$ | 132,842 |
| 22 | | | | · | · | | , |
| 22 3 4 | 21 | General Fund | \$ | 66,421 | \$ 66,42 | 1 \$ | 132,842 |
| 24 6 6 6 6 6 6 6 6 7 7 28 66,421 \$ 66,421 \$ 132,842 30 30 Other Revenues \$ 66,421 \$ 132,842 30< | 22 | | | • | , | | · |
| 25 | 23 | | | | | | |
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| 27 | | | | | | | |
| 28 66,421 \$ 66,421 \$ 132,842 30 Other Revenues 66,421 \$ 66,421 \$ 132,842 32 33 4 35 4 45 4 4 | | | | | | | |
| TOTAL HSA REVENUES \$ 66,421 \$ 66,421 \$ 132,842 | | | | | | | _ |
| Other Revenues | | TOTAL HSA REVENUES | \$ | 66.421 | \$ 66.42 | 1 \$ | 132.842 |
| 31 32 32 33 34 35 36 Total Revenues \$ 66,421 \$ 66,421 \$ 132,842 37 Full Time Equivalent (FTE) 0.75 75% 38 0 39 Prepared by: Kani Lin, Controller Telephone No.: 415-852-5322 Date: 4/18/17 40 HSA-CO Review Signature: | | | * | , | - | | |
| 32 33 34 35 35 5 36 Total Revenues \$ 66,421 \$ 132,842 37 Full Time Equivalent (FTE) 0.75 75% 38 7 75% 39 Prepared by: Kani Lin, Controller Telephone No.: 415-852-5322 Date: 4/18/17 40 HSA-CO Review Signature: 1 | | | | | | | |
| 34 35 35 5 36 Total Revenues \$ 66,421 \$ 66,421 \$ 132,842 37 Full Time Equivalent (FTE) 0.75 75% 38 75% 75% 75% 39 Prepared by: Kani Lin, Controller Telephone No.: 415-852-5322 Date: 4/18/17 40 HSA-CO Review Signature: 1 1 | | | | | | | |
| 35 66,421 \$ 66,421 \$ 132,842 37 Full Time Equivalent (FTE) 0.75 75% 38 Telephone No.: 415-852-5322 Date: 4/18/17 40 HSA-CO Review Signature: 40 HSA-CO Review Signature: | 33 | | | | | | |
| 36 Total Revenues \$ 66,421 \$ 66,421 \$ 132,842 37 Full Time Equivalent (FTE) 0.75 75% 38 Telephone No.: 415-852-5322 Date: 4/18/17 40 HSA-CO Review Signature: Telephone No.: 415-852-5322 Date: 4/18/17 | | | | | | | |
| 37 Full Time Equivalent (FTE) 0.75 75% 38 | 35 | | | | | | |
| 38 39 Prepared by: Kani Lin, Controller Telephone No.: 415-852-5322 Date: 4/18/17 40 HSA-CO Review Signature: | 36 | Total Revenues | \$ | 66,421 | \$ 66,42 | 1 \$ | 132,842 |
| 39 Prepared by: Kani Lin, Controller Telephone No.: 415-852-5322 Date: 4/18/17 40 HSA-CO Review Signature: | 37 | Full Time Equivalent (FTE) | | 0.75 | 75 | % | |
| 40 HSA-CO Review Signature: | | | | | | | |
| | 39 | Prepared by: Kani Lin, Controller | Telepho | one No.: 415 | -852-5322 | Da | ate: 4/18/17 |
| 41 HSA #1 5/25/2017 | 40 | HSA-CO Review Signature: | | | | | |
| | 41 | HSA #1 | | | | | 5/25/2017 |

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| 2 | | | | | | | | | | [| Date: 5/25/17 |
| 3 | Program Name: | | | | | | | | | | |
| 5 | (Same as Line 9 on HSA #1) | | | | | | | | | | |
| 6 | (Game as Eme e en Hert #1) | | | | | | | | | | |
| 7 | | | Salari | es & Benef | fite Dotai | i | | | | | |
| 8 | | | Jaiari | C3 & Delle | iits Detai | | | | | | |
| 9 | | | | | | | | | | | |
| 10 | | | | | | 7/1/1 | 7-6/30/18 | 7/1/18-6/30/1 | 9 | | |
| 11 | | Agency T | otals | HSA Pro | ogram | | Program | DHS Progran | _ | | TOTAL |
| | | | | % FTE | | | J | | | | |
| | | nual Full | Total | funded by HSA | A dimete d | | | | | | |
| 12 | POSITION TITLE | neSalary or FTE | Total FTE | (Max 100%) | Adjusted FTE | | eted Salary | Budgeted Sala | ıry | 7/1/1 | 7 to 6/30/19 |
| 13 | Resident Serivce Team Lead | \$ 48,220 | 1.00 | 25% | 0.25 | \$ | 12,055 | \$ 12,05 | 55 | \$ | 24,110 |
| 14 | Clinical Case Manager | \$ 51,981 | 1.00 | 50% | 0.50 | \$ | 25,991 | \$ 25,99 | 91 | \$ | 51,981 |
| 15 | | | | | | | | | | | |
| 16 | | | | | | | | | | | |
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| 27 | | | | | | | | | | | |
| 28 | | | | | | | | | | | |
| 29 | | | | | | | | | | | |
| 30 31 | TOTALS | | 2.00 | 75% | 0.75 | \$ | 38,046 | \$ 38,04 | 46 | \$ | 76,091 |
| | FRINGE BENEFIT RATE | 28% | | | | | | | | | |
| 33 | EMPLOYEE FRINGE BENEFITS | | | | | \$ | 10,680 | \$ 10,68 | 30 | \$ | 21,359 |
| 34 35 | | | | | | | • | | | | , - |
| | TOTAL CALABIES & BENEFITS | | | | | Φ. | 10.70- | | | • | 07.450 |
| | TOTAL SALARIES & BENEFITS | | | | | \$ | 48,725 | \$ 48,72 | ∠5 | \$ | 97,450 |
| 37 | HSA #2 | | | | | | | | | | 5/25/2017 |

| | А | В | С | D | | E | F | | G | J | K |
|----------|------------------|----------------------|-----------------|--------------|----------|-----------|-----|-------|-------------|-------|------------|
| 1 | | | | | | | | | ndix B-3, P | age 3 | |
| 3 | | | | | | | | Date: | 5/25/17 | | |
| | Duo suo so Nosso | | | | | | | | | | |
| 5 | Program Nam | e: e 9 on HSA #1) | | | | | | | | | |
| 6 | (Odine do Line | 2 3 311 1137 (# 1) | | | | | | | | | |
| 7 | | | | Op | eratin | g Expe | nse | Deta | ail | | |
| 8 | | | | | | | | | | | |
| 9 | | | | | | | | | | | |
| 10 11 | | | | | | | | | | | TOTAL |
| | Expenditure C | ategory | - | ΓERM | 7/1/1 | 7-6/30/18 | | 7/1/1 | 8-6/30/19 | | 17-6/30/19 |
| 13 | Rental of Prop | erty | | | | | - | | | | |
| | | Water, Gas, Pl | none, Scaveng | er) | | | _ | | | | |
| | Office Supplie | | 3 | - / | \$ | 2,463 | - | \$ | 2,463 | \$ | 4,926 |
| | | enance Suppli | es and Repair | | | , | | т | , | | ,==3 |
| | Printing and R | | | | | | | | | | |
| | Insurance | .ор.ошионо | | | \$ | 244 | | \$ | 244 | \$ | 488 |
| | Staff Training | | | | Ψ | | | Ψ | | | 100 |
| | _ | ocal & Out of 3 | Fown) | | \$ | 250 | | \$ | 250 | \$ | 500 |
| | Rental of Equi | | . •, | | <u> </u> | | | Ψ | | | |
| | | | DECODIDENCE T | | | | | | | | |
| 22 | CONSULTANT/S | UBCONTRACTOF | R DESCRIPTIVE I | IILE | | | | | | | |
| 24 | | | | _ | | | | | | | |
| 25 | | | | _ | | | | | | | |
| 26 | | | | _ | | | | | | | |
| 27 | OTHER | | | _ | | | | | | | |
| - | Payroll Expens | ses | | | \$ | 386 | | \$ | 386 | \$ | 772 |
| | Audit/Account | | | - | \$ | 211 | | \$ | 211 | \$ | 422 |
| 30 | | ent Repair (IT | Support) | _ | | | | | | | |
| 31 | IT & Small Off | | | _ | \$ \$ | 795 | | \$ | 795 | \$ | 1,590 |
| 32 | - | l Activities (sta | ff) | _ | | 183 | | \$ | 183 | \$ | 366 |
| 33 | Tenant Projec | ts/Activities | | _ | \$ | 4,500 | | \$ | 4,500 | \$ | 9,000 |
| 34 | | | | | | | | | | | |
| 35 | TOTAL OPER | ATING EXPEN | ISE | | \$ | 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. <u>Program Monitoring</u>: 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. <u>Fiscal Compliance and Contract Monitoring</u>: 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.

| | l A | В | С | D | | | |
|----|---|---|--|---|--|--|--|
| 1 | ^ | Ь | _ | Appendix B, Page 1 | | | |
| 2 | | | | ent Date: 5/12/2017 | | | |
| | | / AANES - ASS | | Dato. 0/12/2017 | | | |
| 3 | HUMAN SERVICES AGENCY | | | | | | |
| 4 | | BY PROGRA | M | | | | |
| 5 | Contractor's Name | | Contrac | t Term | | | |
| | | | o simulati i simi | | | | |
| 6 | Glide Community Housing | | July 1, 2017-J | une 30, 2019 | | | |
| 7 | (Check One) NewX_ Renewal _ | Modification | | | | | |
| 8 | If modification, Effective Date of Mod. | lo of Mod | | | | | |
| ۳ | in modification, Effective Date of Wod. | io. or wiod. | | | | | |
| 9 | Program: 350 Ellis - Rental Assistance Demons | tration | | TOTAL | | | |
| | | | | | | | |
| | Budget Reference Page No.(s) | | | | | | |
| | Program Term | 7/1/17 - 6/30/18 | 7/1/18 - 6/30/19 | 7/1/17 - 6/30/19 | | | |
| 12 | , , , | | | | | | |
| | Salaries & Benefits | \$48,094 | \$48,094 | \$96,188 | | | |
| | Operating Expense | \$9,801 | \$9,801 | \$19,602 | | | |
| | Capital Expenditure | \$0 | \$0 | \$0 | | | |
| | Subtotal | \$57,895 | \$57,895 | \$115,790 | | | |
| | 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 | | | |
| | Subtotal | \$71,682 | \$71,682 | \$143,364 | | | |
| 25 | Indirect Percentage (%) | 13% | 13% | 13% | | | |
| | Indirect Cost (Line 16 X Line 17) | \$9,318 | \$9,318 | \$18,636 | | | |
| _ | Total Developer Expenditures | \$81,000 | \$81,000 | \$162,000 | | | |
| 28 | | , | , , , , , , , , , , , , , , , , , , , | , ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,, | | | |
| _ | Total HSA and Developer Expenditures | \$146,421 | \$146,421 | \$292,842 | | | |
| 30 | HSA Revenues | | . , | | | | |
| _ | Local General Fund | \$65,421 | \$65,421 | \$130,842 | | | |
| 32 | Local General Fund | ψ00,421 | ψ00,π21 | ψ100,042 | | | |
| 33 | | | | | | | |
| 34 | | | | | | | |
| 35 | | | | | | | |
| 36 | | | | | | | |
| 37 | | | | | | | |
| 38 | | | | | | | |
| 39 | TOTAL HSA REVENUES | \$65,421 | \$65,421 | \$130,842 | | | |
| 40 | Developer Revenues | Ţ, · - · | +,- | Ţ:, 5:- | | | |
| 41 | Developer Match Funds | \$81,000 | \$81,000 | \$162,000 | | | |
| 42 | 20.0.0por matori i ando | ψ01,000 | ψο1,000 | ψ102,000 | | | |
| 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. 415-67 | 4-6107 | | | |
| 50 | HSA-CO Review Signature: | | | | | | |
| | HSA #1 | | | | | | |
| 52 | | | | | | | |

| | Α | В | С | D | Е | F |
|----------|--|---------------|-----------------------|---------------|-----------------------|--|
| 1 | | | | | Danum | Appendix B, Page 2 nent Date: 5/12/2017 |
| 3 | | | | | Docun | nent Date: 5/12/2017 |
| 4 | Contractor's Name: Glide Community House | sing - 350 E | Ellis (RAD) | | | |
| 5 | | | | | | |
| 6 | | | 0-1 | D | D - (- '' | |
| 7 | | | Salaries & | Benefits | Detail | |
| 8 | | | | | | |
| ٣ | Γ | Human | Services | Human | Services | |
| 10 | | | ency | | ency | TOTAL |
| 11 12 | TERM_ POSITION TITLE | 7/1/17 FTE | - 6/30/18 SALARIES | 7/1/18 FTE | - 6/30/19 SALARIES | 7/1/17 - 6/30/19 |
| <u> </u> | T GOTTION TITLE | | O/ IL/ II (ILO | | O/ LE/ LI LIEO | |
| 13 | Support Services Case Manager- Lead | 0.30 | \$15,151 | 0.30 | \$15,151 | \$30,302 |
| 14 | Executive Director | 0.05 | 5,674 | 0.05 | 5,674 | \$11,348 |
| 15 | Operations Manager | 0.05 | 3,467 | 0.05 | 3,467 | \$6,934 |
| 16 | Case Manager (Spanish Speaker) | 0.10 | 2,185 | 0.10 | 2,185 | \$4,370 |
| 17 | Admin Asst | | | | | \$19,456 |
| | | 0.30 | 9,728 | 0.30 | 9,728 | |
| 18 | Project Manager | 0.05 | 1,664 | 0.05 | 1,664 | \$3,328 |
| 19 | | | | | | |
| 20 | | | | | | |
| 21 | | | | | | |
| 22 | | | | | | |
| 23 | TOTALS | 0.85 | \$37,869 | 0.85 | \$37,869 | \$75,738 |
| 24 25 | | | | | | |
| | EMPLOYEE FRINGE BENEFITS | 27% | \$10,225 | 27% | \$10,225 | \$20,450 |
| 27 | Emileo I E I I I I I I I I I I I I I I I I I | 2.70 | Ψ10, <u>22</u> 0 | 21 70 | Ψ10,220 | Ψ20,100 |
| 28 | г | | | | | |
| 29 | TOTAL HSA SALARIES & BENEFITS | | \$48,094 | | \$48,094 | \$96,188 |
| 30 | | | | | | |
| 31 | DEVELOPER MATCH POSITION TITLE | | | | | |
| 32 | Support Services Case Manager Lead | 0.50 | \$25,251 | 0.50 | \$25,251 | \$50,502 |
| 33 | Clincial Director/Supervisor | 0.20 | \$14,988 | 0.20 | \$14,988 | \$29,976 |
| 34 | Project Manager | 0.05 | \$1,664 | 0.05 | \$1,664 | \$3,328 |
| 35 | Executive Director | 0.10 | \$11,347 | 0.10 | \$11,347 | \$22,695 |
| 36 | Case Manager | 0.05 | \$1,093 | 0.05 | \$1,093 | \$2,185 |
| 37 | | | | | | |
| 38 | TOTALS | 0.90 | \$54,343 | 0.90 | \$54,343 | \$108,686 |
| 39 | _ | | | | | |
| 40 | EMPLOYEE FRINGE BENEFITS | 27% | \$14,673 | 27% | \$14,673 | \$29,346 |
| 41 | | | . , | - 1 | , , , | . , - |
| 42 | TOTAL DEVELOPER SALARIES & BENEF | TITS | \$69,016 | | \$69,016 | \$138,032 |
| 43 | | | +-0,0.0 | | +20,0.0 | ψ.00,00 <u>L</u> |
| 44 | TOTAL SALARIES & BENEFITS | 1.75 | \$117,110 | 1.75 | \$117,110 | \$234,220 |
| 45 | TO THE OTHER MICEO & DEINEI 110 | 1.73 | ψιιι,ΙΙΟ | 1.73 | ψ111,110 | Ψ204,220 |
| | HSA #2 | | | | | |
| 47 | | | | | | |

| | A B C | D | E F | G H | H I |
|----------|---|---------|--------------------------|-----------------------|---|
| 1 2 | | | | Dogum | Appendix B, Page 3 ment Date: 5/12/2017 |
| 3 | | | | Docur | nent Date: 5/12/2017 |
| 4 | Contractor's Name: Glide Community Housing | - 350 E | lis (RAD) | | |
| 5 6 | | | | | |
| 7 | | Ope | rating Expense D | etail | |
| 8 | | Г | | | |
| 9 | | | Human Services Agency | Human Services Agency | TOTAL |
| 10 | | _ | J, | | |
| 11 | HSA Expenditure Category | TERM | 7/1/17 - 6/30/18 | 7/1/18 - 6/30/19 | 7/1/17 - 6/30/19 |
| 12 | Rental of Property | - | | | |
| 13 | Utilities (Elec, Water, Gas, Phone, Scavenger) | - | \$1,000 | \$1,000 | \$2,000 |
| 14 | Office Supplies, Postage | - | \$2,006 | \$2,006 | \$4,012 |
| 15 | Building Maintenance Supplies and Repair | _ | | | |
| 16 | Printing and Reproduction | _ | | | |
| 17 | Insurance | _ | | | |
| 18 | Staff Training | _ | \$300 | \$300 | \$600 |
| 19 | Staff Travel-(Local & Out of Town) | _ | \$300 | \$300 | \$600 |
| 20 | Rental of Equipment | - | | | |
| 21 | • • | - | | | |
| 22 | | | | | |
| - | OTHER | | | | |
| 24 25 | Resident Activities Consultants/Subcontractors-IT Services | | \$5,195 \$1,000 | \$5,195 \$1,000 | \$10,390 \$2,000 |
| 26 | Consultants/Subcontractors-11 Services | | ψ1,000 | φ1,000 | ψ2,000 |
| 27 | | | | | |
| 28 | TOTAL HSA OPERATING EXPENSE | _ | \$9,801 | \$9,801 | \$19,602 |
| 29 | | | | | |
| 30 | Developer Match Operating Expense | | | | |
| 31 | Rental of Property | | | | |
| | Utilities(Elec, Water, Gas, Phone, Scavenger) | _ | | | |
| | Office Supplies, Postage | - | | | |
| | Building Maintenance Supplies and Repair | - | _ | | |
| | Printing and Reproduction | - | | | |
| | Insurance | - | | | |
| | | - | _ | | |
| | Staff Training Staff Travel (Lease & Out of Town) | - | | | _ |
| | Staff Travel-(Local & Out of Town) | - | _ | | |
| | Rental of Equipment | - | | | |
| 40 | OTHER | | | | |
| | OTHER Resident Activities | | \$2,666 | \$2,666 | \$5,332 |
| 43 | - | | , -, | ,3 | |
| 44 45 | TOTAL DEVELOPER OPERATING EXPENSE | | \$2,666 | \$2,666 | \$5,332 |
| 46 | - · · · · · · · · · · · · · · · · · · · | - | , -, | ,3 | |
| 47 48 | TOTAL OPERATING EXPENSE | | \$12,467 | \$12,467 | \$24,934 |
| 49 | | - | ψ12,701 | ψ12,τ01 | Ψ24,334 |
| 50 51 | HSA #3 | | | | |
| υı | | | | | |

Appendix B, Page 4 Document Date: 5/12/2017

Contractor's Name: Glide Community Housing - 350 Ellis (RAD)

(Same as Line 6 on HSA #1)

Indirect Cost Detail

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

2. Operating Cost - HSA

| Expenditure Category | <u>7/1/17 - 6/30/18</u> | <u>7/1/18 - 6/30/19</u> | 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. <u>Program Monitoring</u>: 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. <u>Fiscal Compliance and Contract Monitoring</u>: 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 | В | С | D |
|----|---|--------------------|--------------------|----------------------|
| 1 | | | | ppendix B-1, Page 1 |
| 2 | | | | nent Date: 4/25/2017 |
| 3 | HUMAN SERVICES AGENCY | CONTRACT BUILD | CET CHMMADV | |
| 4 | HOWAIN SERVICES AGENCY | BY PROGRAI | | |
| 5 | Contractor's Name | BITROOKA | Contrac | t Torm |
| | | | | |
| 6 | Mercy Housing: 345 Arguello | | July 1, 2017-J | une 30, 2019 |
| 7 | (Check One) NewX Renewal | Modification | | |
| 8 | If modification, Effective Date of Mod. N | lo. of Mod. | | |
| 9 | Program: Rental Assistance Demonstration | | | TOTAL |
| 40 | - | | | |
| | Budget Reference Page No.(s) | 7/4/47 0/00/40 | 7/4/40 0/20/40 | 7/4/47 6/20/40 |
| 12 | Program Term Human Services Agency Expenditures | 7/1/17-6/30/18 | 7/1/18-6/30/19 | 7/1/17-6/30/19 |
| _ | Salaries & Benefits | PO | ¢o. | C O |
| | Operating Expense | \$0 \$30,254 | \$0 \$30,254 | \$0 \$60,508 |
| | Capital Expenditure | \$0 | \$0,234 | \$00,308 |
| | Subtotal | \$30,254 | \$30,254 | \$60,508 |
| 17 | Indirect Percentage (%) | 13% | 13% | 13% |
| | Indirect Cost (Line 16 X Line 17) | \$3,933 | \$3,933 | \$7,866 |
| - | Total HSA Expenditures | \$34,187 | \$34,187 | \$68,374 |
| 20 | Developer Match Expenditures | , , , | + - , - | + , - |
| 21 | | \$81,000 | \$81,000 | \$162,000 |
| 22 | Operating Expense | \$0 | \$0 | \$0 |
| | 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 | | | |
| | Local General Fund | \$34,187 | \$34,187 | \$68,374 |
| 29 | | | | |
| 30 | | | | |
| 31 | | | | |
| 33 | | | | |
| 34 | | | | |
| 35 | | | | |
| 36 | TOTAL HSA REVENUES | \$34,187 | \$34,187 | \$68,374 |
| 37 | Developer Revenues | 70.,.01 | 40.,.01 | 700,011 |
| 38 | Developer Match Funds | \$81,000 | \$81,000 | \$162,000 |
| 39 | | | · | · |
| 40 | | | | |
| 41 | Total Davidson on D | *** | # 04.005 | M /00 000 |
| 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 | ٦ | Telephone No. | |
| 48 | HSA-CO Review Signature: | | | |
| 49 | HSA #1 | | | |
| 50 | - | | | |
| | | | | |

| | A | В | С | D | E | F |
|----------|---------------------------------|----------|-------------------|-----------|--------------------|---|
| 1 2 | | | | | | ppendix B-1, Page 2 nent Date: 4/25/2017 |
| 3 | | | | | Docum | ient Date: 4/25/2017 |
| | Mercy Housing: 345 Arguello | | | | | |
| 5 | | | | | | |
| 7 | | | Salaries 8 | Ponofi | te Detail | |
| 8 | | | Salaries | x Dellell | is Detail | |
| 9 | | | | | | |
| | | | Services | | n Services | |
| 10 | TERM | | ency -6/30/18 | | gency 8-6/30/19 | TOTAL 7/1/17-6/30/19 |
| 12 | POSITION TITLE | FTE | SALARIES | FTE | SALARIES | 171717-0/30/13 |
| 13 | | | | | | |
| 14 | | | | | | |
| 15 | | | | | | |
| 16 | | | | | | |
| 17 | | | | | | |
| 18 | | | | | | |
| 19 | | | | | | |
| 20 | | | | | | |
| 21 | | | | | | |
| 22 | | | | | | |
| 23 | TOTALS | | | | | |
| 24 | TOTALS | | | | | |
| 25 | | _ | | | | |
| 26 27 | EMPLOYEE FRINGE BENEFITS | | | | | |
| 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 | \$126,562 |
| 33 | | | | | | |
| 34 | | | | | | |
| 35 | | | | | | |
| 36 | | | | | | |
| 37 | | | | | | |
| 38 | TOTALS | 1.00 | \$63,281 | 1.00 | \$63,281 | \$126,562 |
| 39 | | | , , | | , , | -,,,, |
| | EMPLOYEE FRINGE BENEFITS | 28% | \$17,719 | 28% | \$17,719 | \$35,438 |
| 41 | | 2070 | ÷ · · , · · · · · | 20,0 | + , | 400, .00 |
| | TOTAL DEVELOPER SALARIES & BENE | FITS | \$81,000 | | \$81,000 | \$162,000 |
| | TOTAL SALARIES & BENEFITS | 1.00 | \$81,000 | 1.00 | \$81,000 | \$162,000 |
| 44 | 10 ME ONE WILL ON DEINER ITO | 1.00 | ψο1,000 | 1.00 | ψο 1,000 | ψ102,000 |
| 45 | HSA #2 | | | | | |
| 46 | | | | | | |

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|----------|---|-----|------------------|----------------|---|
| 1 | | | | | Appendix B-1, Page 3 ment Date: 4/25/2017 |
| 3 | | | | Docu | ment Date. 4/25/2017 |
| 5 | Mercy Housing: 345 Arguello | | | | |
| 6 | | | | | |
| 7 | | Ope | rating Expense D | etail | |
| 8 | | Г | Human Services | Human Services | |
| 9 | | | Agency | Agency | TOTAL |
| | | ERM | 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 | - | 2,000 | 2000 | 4,000 |
| 14 | Maintenance Supplies and Repair | - | | | - |
| 15 | Printing and Reproduction | - | | | - |
| 16 | Insurance | - | | | |
| 17 | Staff Travel (local) &Training | - | 1,900 | 1,900 | 3,800 |
| 18 | Law Library | - | | | |
| 19 | Membership/Dues | - | | | |
| 20 | Rental of Equipment | _ | | | |
| | Senior Right Bulletin | | | | |
| 22 | | - | | | |
| 23 24 | | - | | | |
| | OTHER | - | | | |
| - | Supervision | | 8,960 | 8,960 | 17,920 |
| | Supplies for Monthly Community Projects & Events. Including, but not limited to: Health and | - | 17,394 | 17,394 | 34,788 |
| 28 29 | Wellness programs, Education Workshops, | - | | | |
| 30 | Food & Beverages. | - | | | |
| 31 | TOTAL HSA OPERATING EXPENSE | | \$30,254 | \$30,254 | \$60,508 |
| 32 | | - | , , | | |
| | 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 | - | | | |
| 46 | σαιποτίαι σείνισε α συμμίθο | - | | | |
| | TOTAL DEVELOPER OPERATING EXPENSE | - | \$0 | \$0 | \$0 |
| | TOTAL OPERATING EXPENSE | - | \$30,254 | \$30,254 | \$60,508 |
| 51 52 | HSA #3 | | | | |
| 53 | | | <u> </u> | | |

| Appendix B- Document Date: | | | | | | |
|---|----------|--------|----------------------------|-----|----------------------------|----------------|
| Mercy Housing: 345 Arguello (Same as Line 6 on HSA #1) | | | | | | |
| | | Indire | ect Cost Detail | | | |
| Salaries and Benefits | TEDM | | Human Services Agency | | Human Services Agency | TOTAL |
| Position Title | TERM | FTE | 7/1/17-6/30/18 SALARIES | FTE | 7/1/18-6/30/19 SALARIES | TOTAL SALARIES |
| 1 OSITION THE | | | JALANILO | | SALARIES | JALANIES . |
| | | | | | | |
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| | | | | | | |
| | | | | | | |
| | | | | | | |
| EMPLOYEE FRINGE BENEFITS | | % | | % | | |
| TOTAL SALARIES & BENEFITS | | 70 | | 70 | | |
| Operating Cost Expenditure Category | | | | | | |
| Q/A Fee i.e Contract Administrator etc | • | | \$3,933 | | \$2,022 | \$7,866 |
| Q/A Fee i.e Contract Administrator etc | <u>.</u> | | | • | \$3,933 | |
| | _ | | | • | | |
| | - | | | • | | |
| | - | | | - | | - |
| | - | | | • | | - |
| | _ | | | • | | |
| | - | | | • | | - |
| | _ | | | - | | |
| TOTAL OPERATING COST | _ | | \$3,933 | - | \$3,933 | \$7,866 |
| TOTAL INDIRECT COST | | | \$3,933 |] | \$3,933 | \$7,866 |
| (Salaries & Benefits + Operating Cost | i) | | ψ0,900 | 1 | ψυ,συυ | ψ1,000 |
| 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.
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- 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.
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- Grantee will work collaboratively with DAAS to strategize program direction and services provision.
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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):

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- 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

٥r

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

X. Monitoring Activities

- A. <u>Program Monitoring</u>: 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.

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| 1 | | <u>, </u> | À | ppendix B-2, Page 1 | | | | |
| 2 | | | Docun | nent 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 _X_ Renewal | Modification | | | | | | |
| 8 | If modification, Effective Date of Mod. | lo. 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 | | | | |
| | Operating Expense | \$31,581 | \$31,581 | \$63,162 | | | | |
| | Capital Expenditure | \$0 | \$0 | \$0 | | | | |
| | Subtotal (0) | \$31,581 | \$31,581 | \$63,162 | | | | |
| | Indirect Percentage (%) | 13% | 13% | 13% | | | | |
| | Indirect Cost (Line 16 X Line 17) | \$4,106 | \$4,106 | \$8,212 | | | | |
| | Total HSA Expenditures | \$35,687 | \$35,687 | \$71,374 | | | | |
| 20 | Developer Match Expenditures | | | | | | | |
| | Salaries & Benefits | \$81,000 | \$81,000 | \$162,000 | | | | |
| | Operating Expense | \$0 | \$0 | \$0 | | | | |
| | Capital Expenditure | \$0 | \$0 | \$0 | | | | |
| | Total Developer Expenditures | \$81,000 | \$81,000 | \$162,000 | | | | |
| 25 | T : 11104 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 | * | * | * | | | | |
| | Total HSA and Developer Expenditures | \$116,687 | \$116,687 | \$233,374 | | | | |
| 27 | HSA Revenues | | . | 4 | | | | |
| | 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 | Total Davalanar Davasusa | 604.000 | 604 000 | 0400 000 | | | | |
| 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) 3 | 355-7120 | | | | |
| 45 | HSA-CO Review Signature: | | _ | | | | | |
| | HSA #1 | | | | | | | |
| 47 | | | | | | | | |

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| 1 | | | | | | ppendix B-2, Page 2 ent Date: 4/25/2017 | |
| 3 | | | | | Docum | eni Dale: 4/25/2017 | |
| 4 | Mercy Housing: 31st Avenue | | | | | | |
| 5 6 | | | | | | | |
| | | | Salaries 8 | Ponofi | te Detail | | |
| 7 8 | | | Salaries | k benen | is Detail | | |
| 9 | | | | | | | |
| | | Human Services Human Services | | | | | |
| 10 11 | TERM | Agency 7/1/17-6/30/18 | | Agency 7/1/18-6/30/19 | | TOTAL 7/1/17-6/30/19 | |
| 12 | POSITION TITLE | FTE | SALARIES | FTE | SALARIES | 7/1/17-0/30/19 | |
| 13 | Resident Services Coordinator | | | | | | |
| 14 | | | | | | | |
| 15 | | | | | | | |
| 16 | | | | | | | |
| 17 | | | | | | | |
| 18 | | | | | | | |
| 19 | | | | | | | |
| 20 | | | | | | | |
| 21 | | | | | | | |
| 22 | | | | | | | |
| 23 | TOTALS | | | | | | |
| 24 | • | • | • | | • | | |
| 25 | EMPLOYEE FRINGE BENEFITS | | | | | | |
| 27 | EMPLOTEE PRINGE BENEFITS | | | | | | |
| 28 | , | 1 | | | T | | |
| 29 | TOTAL HSA SALARIES & BENEFITS | | \$0 | | \$0 | \$0 | |
| 30 | | | | | | | |
| 31 | DEVELOPER MATCH | | | | | | |
| 32 | POSITION TITLE | | | | | | |
| 33 | Resident Services Coorindator | 1.00 | \$63,281 | 1.00 | \$63,281 | \$126,562 | |
| 34 | | | | | | | |
| 35 | | | | | | | |
| 36 | | | | | | | |
| 37 | | | | | | | |
| 38 | TOTALC | 4.00 | # 00.004 | 4.00 | # 00.004 | \$400 F00 | |
| 39 40 | TOTALS | 1.00 | \$63,281 | 1.00 | \$63,281 | \$126,562 | |
| | EMPLOYEE FRINGE BENEFITS | 28% | \$17,719 | 28% | \$17,719 | \$35,438 | |
| 42 | LOTEL TRINGE DENETHO | 20 /0 | Ψ17,713 | 20 /0 | ψ11,113 | ψου,4ου | |
| | | | | | \$162,000 | | |
| 44 | TOTAL SALARIES & BENEFITS | 1.00 | \$81,000 | 1.00 | \$81,000 | \$162,000 | |
| 45 | | | | | | | |
| | HSA #2 | | | | | | |
| 47 | | | | | | | |

| | A B C | D | E F | G H | I | | |
|----------------|---|-----------|------------------------------|---------------------------------|----------------------|--|--|
| 1 | • | | • | | Appendix B-2, Page 3 | | |
| 3 | | | | Docur | ment Date: 4/25/2017 | | |
| 4 | Mercy Housing: 31st Avenue | | | | | | |
| 5 | | | | | | | |
| 7 | Operating Expense Detail | | | | | | |
| 8 | | • | | | | | |
| 9 | | | Human Services | Human Services | TOTAL | | |
| | HSA Expenditure Category | TERM | Agency 7/1/17-6/30/18 | Agency 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 | - | <u> </u> | <u> </u> | | | |
| 15 | Printing and Reproduction | - | | | | | |
| 16 | Insurance | - | | | | | |
| 17 | Staff Travel (local) &Training | - | 1,500 | 1,500 | 3,000 | | |
| 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 & Eve | ents. (lı | | 18,750 | 37,500 | | |
| 27 28 | Supervision | | 9,580 | 9,580 | 19,160 | | |
| 29 | | | | | | | |
| 30 | | | | | | | |
| 31 | TOTAL HSA OPERATING EXPENSE | | \$31,581 | \$31,581 | \$63,162 | | |
| 32 | | - | | | | | |
| | Developer Match Operating Expense | | | | | | |
| | Rental of Property | | | | | | |
| | | - | | | | | |
| | Telephone | - | | | | | |
| | Office Supplies, Postage | - | <u> </u> | | | | |
| | Printing and Reproduction | - | | - | | | |
| | 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 | - | | | | | |
| | Janitorial service & supplies | - | | | | | |
| 47 | | - | | | | | |
| 48 | TOTAL DEVELOPER OPERATING EXPENSE | _ | \$0 | \$0 | \$0 | | |
| 49 50 51 | TOTAL OPERATING EXPENSE | - | \$31,581 | \$31,581 | \$63,162 | | |
| | HSA #3 | | | | | | |
| 53 | | | | | | | |

| Mercy Housing : 31st Avenue (Same as Line 6 on HSA #1) | | | | | | | |
|---|---|--------|--------------------------|---|--------------------------|---|----------------|
| | | Indire | ect Cost Detail | | | | |
| 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 | Indirect Cost Detail Human Services Agency 7/1/17-6/30/19 7/1/18-6/30/19 7/1/17-6/30/19 Itle | | | | | | |
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| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| EMPLOYEE FRINGE BENEFITS | | % | | % | | | |
| TOTAL SALARIES & BENEFITS | | | | | | | |
| | | | | | | | |
| Operating Cost | | | | | | | |
| Expenditure Category | | | | | | | |
| Q/A Fee i.e Contract Administrator, etc | <u>c</u> . | | \$4,106 | ı | \$4,106 | _ | \$8,212 |
| | _ | | | • | | _ | |
| | _ | | | | | _ | |
| | _ | | | - | | _ | |
| | _ | | | - | | _ | |
| | - | | | | | | |
| | • | | | | | - | |
| | • | | | | | - | |
| | • | | | | | - | |
| | • | | | | | - | |
| TOTAL OPERATING COST | | | \$4,106 | | \$4,106 | | \$8,212 |
| | | | | | | - | |
| TOTAL INDIRECT COST | | | \$4,106 | | \$4,106 | | \$8,212 |
| (Salaries & Benefits + Operating Cost) |) | | | | | | |
| 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

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

- Build tenant base
- Develop neighborhood partnerships

- 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.

- 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.

• 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

- 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.

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.

- 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:

or

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

- A. <u>Program Monitoring</u>: 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 | В | С | D | | | | | |
|----------|--|-----------------------|-----------------------|----------------------|--|--|--|--|--|
| 1 | | | App | pendix B-3, Page 1 | | | | | |
| 2 | | | Docume | nt Date: 04/25/2017 | | | | | |
| 3 | HUMAN SERVICES AGENCY | CONTRACT BUD | GET SUMMARY | | | | | | |
| 4 | 1101117111 02111010 7102110 | BY PROGRA | | | | | | | |
| | 0 | DITROGRA | | · - | | | | | |
| 5 | Contractor's Name | | Contrac | t i erm | | | | | |
| 6 | Mercy Housing 1880 Pine Street July 1, 2017 -June 30, 2019 | | | | | | | | |
| 7 | (Check One) New _X_ Renewal _ | Modification | | | | | | | |
| 8 | If modification, Effective Date of Mod. | lo. of Mod. | | | | | | | |
| ٣ | ii modification, Encetive Bate of Mod. | to. or wou. | | | | | | | |
| 9 | Program: Rental Assistance Demonstration | | | TOTAL | | | | | |
| 10 | Pudget Reference Roge No.(a) | | | | | | | | |
| | Budget Reference Page No.(s) | 07/1/17-6/30/18 | 7/1/18-6/30/19 | 07/4/47 6/20/40 | | | | | |
| 11 | Program Term Human Services Agency Expenditures | 07/1/17-6/30/18 | 7/1/18-6/30/19 | 07/1/17-6/30/19 | | | | | |
| | Salaries & Benefits | \$40 F00 | ¢40 500 | ¢04.000 | | | | | |
| | Operating Expense | \$40,500 \$42,824 | \$40,500 \$42,824 | \$81,000 \$85,648 | | | | | |
| | Capital Expenditure | \$0 | \$0 | \$05,040 | | | | | |
| | Subtotal | \$83,324 | \$83,324 | \$166,648 | | | | | |
| 17 | Indirect Percentage (%) | 13% | 13% | 13% | | | | | |
| | Indirect Cost (Line 16 X Line 17) | \$10,832 | \$10,832 | \$21,664 | | | | | |
| | Total HSA Expenditures | \$94,156 | \$94,156 | \$188,312 | | | | | |
| 20 | Developer Match Expenditures | 4 0 1,100 | QU 1,100 | * 100,012 | | | | | |
| 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 | | | | | | | | | |
| 35 | | | | | | | | | |
| 36 | TOTAL HSA REVENUES | \$94,156 | \$94,156 | \$188,312 | | | | | |
| | Developer Revenues | φ 94 , 100 | φ 94 , 100 | φ100,31Z | | | | | |
| 37 38 | Developer Match Funds | \$81,000 | \$81,000 | \$162,000 | | | | | |
| 39 | Developer materia unus | φ01,000 | ψο1,000 | ψ102,000 | | | | | |
| 40 | | | | | | | | | |
| 41 | | | | | | | | | |
| 42 | Total Developer Revenues | \$81,000 | \$81,000 | \$162,000 | | | | | |
| 43 | Total Revenues | \$175,156 | \$175,156 | \$350,312 | | | | | |
| 44 | | 1.50 | | • | | | | | |
| 44 | Full Time Equivalent (FTE) | | 1.50 | | | | | | |
| 46 | Prepared by: Samantha Hogg | - | Telephone No. (415) 3 | 55.7120 | | | | | |
| 47 | HSA-CO Review Signature: | | | | | | | | |
| 40 | | | _ | | | | | | |
| 48 49 | HSA #1 | | | | | | | | |
| 49 | | | | | | | | | |

| | А | В | С | D | Е | F |
|----------|---|------|-------------------|-----------|--------------------|---------------------|
| 1 | | | | | | opendix B-3, Page 2 |
| 3 | | | | | Documei | nt Date: 04/25/2017 |
| 4 | Mercy Housing 1880 Pine Street | | | | | |
| 5 6 | | | | | | |
| 7 | | | Salaries 8 | 2. Renefi | te Detail | |
| 8 | | | Jaianes | x Dellell | is Detail | |
| 9 | | | | | | |
| 10 | | | Services | | n Services | TOTAL |
| 11 | TERM | | ency 7-6/30/18 | | gency 8-6/30/19 | 07/1/17-6/30/19 |
| 12 | POSITION TITLE | FTE | SALARIES | FTE | SALARIES | |
| 13 | Resident Services Coordinator | 0.50 | \$31,640 | 0.50 | \$31,640 | \$63,280 |
| 14 | | | | | | |
| 15 | | | | | | |
| 16 | | | | | | |
| 17 | | | | | | |
| 18 | | | | | | |
| 19 | | | | | | |
| 20 | | | | | | |
| 21 | | | | | | |
| 22 | | | | | | |
| 23 | TOTALS | 0.50 | \$31,640 | 0.50 | \$31,640 | \$63,280 |
| 24 | , | 0.00 | ψο .,σ .σ | 0.00 | Ψο . , ο . ο | 400,200 |
| 25 | | | | | | |
| 26 27 | EMPLOYEE FRINGE BENEFITS | 28% | \$8,860 | 28% | \$8,860 | \$17,720 |
| 28 | | 1 | | | | |
| 29 | TOTAL HSA SALARIES & BENEFITS | | \$40,500 | | \$40,500 | \$81,000 |
| 30 | | | | | | |
| 31 | DEVELOPER MATCH POSITION TITLE | | | | | |
| 32 | Resident Services Coorindator | 1.00 | \$63,281 | 1.00 | \$63,281 | \$126,562 |
| 33 | | | | | | |
| 34 | | | | | | |
| 35 | | | | | | |
| 36 | | | | | | |
| 37 | | | | | | |
| 38 | TOTALS | 1.00 | \$63,821 | 1.00 | \$63,281 | \$126,562 |
| 39 | | | | | | |
| | EMPLOYEE FRINGE BENEFITS | 28% | \$17,719 | 28% | \$17,719 | \$35,438 |
| 41 | | | | | | |
| | TOTAL DEVELOPER SALARIES & BENE | FITS | \$81,000 | | \$81,000 | \$162,000 |
| 43 | TOTAL SALARIES & BENEFITS | 1.50 | \$121,500 | 1.50 | \$121,500 | \$243,000 |
| 44 | | ' | | Į. | | |
| 45 | HSA #2 | | | | | |
| 46 | | | | | | |

| | A B C | D | Е | F G I | Н |
|---------------|---|----------|------------------|-----------------|---|
| 1 | | | | Docum | Appendix B-3, Page 3 nent Date: 04/25/2017 |
| 3 | | | | Docuit | ieni Date. 04/25/2017 |
| <u>4</u> 5 | Mercy Housing 1880 Pine Street | | | | |
| 6 | | | | | |
| 7 | | Ope | rating Expense [| Detail | |
| 8 | | | Human Services | Human Services | |
| 9 | | | Agency | Agency | TOTAL |
| 10 | HSA Expenditure Category | TERM | 07/1/17-6/30/18 | 7/1/18-6/30/19 | 07/1/17-6/30/19 |
| 11 | Rental of Property | , | | | - |
| 12 | Telephone | • | | | |
| 13 | Office Supplies, Postage | | 2,000 | 2,000 | 4,000 |
| 14 | Maintenance Supplies and Repair | | | | |
| 15 | Printing and Reproduction | | | | - |
| 16 | Insurance | | | | |
| 17 | Staff Travel (local) &Training | | 2,500 | 2,500 | 5,000 |
| 18 | Law Library | | | | |
| 19 | Membership/Dues | • | | | |
| 20 | Rental of Equipment | | | | |
| 21 | | • | | | |
| 22 | | _ : | | | |
| 23 | | _ | | | |
| 24 | 071150 | _ , | | | - |
| 26 | OTHER Supplies for Monthly Community Projects & | Events | 28,250 | 28,250 | 56,500 |
| 27 | | LVEIII3. | 10,074 | 10,074 | 20,148 |
| 28 | | _ ; | | | |
| 29 | | | | | - |
| 30 | TOTAL LIGA OBERATING EVERNOR | | # 40.004 | # 40.004 | # 05.040 |
| | TOTAL HSA OPERATING EXPENSE | , | \$42,824 | \$42,824 | \$85,648 |
| 32 | | | | | |
| | Developer Match Operating Expense | | | | |
| | Rental of Property | • | | | - |
| 35 | Telephone | | | | |
| | 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 | | | | | |
| | TOTAL DEVELOPER OPERATING EXPEN | SE | \$0_ | \$0 | \$0 |
| 49 50 | TOTAL OPERATING EXPENSE | | \$42,824 | \$42,824 | \$85,648 |
| 51 | | • | ψ 12,02 T | Ψ 12,02 T | \$55,570 |
| 52 53 | HSA #3 | | | | |
| -50 | | | | | |

| | | | | | Docur | | endix B, Page 4 ate: 04/25/2017 |
|--|------|--------|--------------------------|-----|--------------------------|-----|------------------------------------|
| Contractor's Name: Mercy Housing (Same as Line 6 on HSA #1) | | | | | | | |
| | | Indire | ect Cost Detail | | | | |
| Salaries and Benefits | | | Human Services Agency | | Human Services Agency | | |
| B | TERM | | 07/1/17-6/30/18 | | 7/1/18-6/30/19 | | 7/1/18-6/30/19 |
| Position Title | 1 | FTE | SALARIES I | FTE | SALARIES | FTE | TOTAL |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | _ |
| | | | | | | | _ |
| | | | | | | | _ |
| | | | | | | | _ |
| | | | | | | | |
| | | | | | | | _ |
| EMPLOYEE FRINGE BENEFITS | | % | | % | | | _ |
| TOTAL SALARIES & BENEFITS | | | | | | | |
| | | | | | | | |
| Operating Cost | | | | | | | |
| Expenditure Category | | | | | | | |
| Q/A Fee i.e Contract Administrator e | tc. | | \$10,832 | • | \$10,832 | • | \$21,664 |
| | _ | | | - | | ı | |
| | | | - | • | | • | - |
| | _ | | | • | - | • | |
| | _ | | | - | | ı | |
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| | _ | | | • | | | |
| | | | | • | | | |
| | | | | | | | |
| | | | | | | | |
| TOTAL OPERATING COST | | | \$10,832 | • | \$10,832 | | \$21,664 |
| | | | | ì | | 1 | |
| TOTAL INDIRECT COST (Salaries & Benefits + Operating Co. | c+) | | \$10,832 | | \$10,832 | | \$21,664 |
| (Salaries & Beriefits + Operating Co. | SI) | | | | | | |
| HSA# 5 | | | | | | | |

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

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

- Build tenant base
- Develop neighborhood partnerships

- 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.

- 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.

• 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

- 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.

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.

- 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:

or

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

- A. <u>Program Monitoring</u>: 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 | В | С | D |
|----------|--|--------------------|-----------------------|----------------------|
| 1 | | | | Appendix B-4, Page 1 |
| 2 | | | Docume | ent Date: 04/25/2017 |
| 3 | HUMAN SERVICES AGENCY | CONTRACT BUD | GET SUMMARY | |
| 4 | | | | |
| 5 | Contractor's Name | | Contrac | ct Term |
| 6 | Mercy Housing : 1760 Bush Street | July 1, 2017 - | June 30, 2019 | |
| 7 | (Check One) New _X_ Renewal | | • | · |
| 8 | | lo. of Mod. | | |
| 9 | Program: Rental Assistance Demonstration | | | TOTAL |
| | Budget Reference Page No.(s) | | | |
| | 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 | 17 17 11 07 007 10 | 17 17 10 07 007 10 | 171711 6766716 |
| - | Salaries & Benefits | \$40,500 | \$40,500 | \$81,000 |
| | Operating Expense | \$41,718 | \$41,718 | \$83,436 |
| | Capital Expenditure | \$0 | \$0 | \$0 |
| | 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 |
| | 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) 3 | 355-7120 |
| 45 | HSA-CO Review Signature: | | | |
| | HSA #1 | | | |
| 47 | | | | |

| | A | В | С | D | E | F |
|----------|---------------------------------|-------|----------------------|----------|-----------------------|--|
| 1 2 | | - | | | | ppendix B-4, Page 2 nt Date: 04/25/2017 |
| 3 | | | | | Docume | nt Date: 04/25/2017 |
| | Mercy Housing: 1760 Bush Street | | | | | |
| 5 | | | | | | |
| 6 | | | Calarias S | . Danafi | to Detail | |
| 7 8 | | | Salaries 8 | k Beneti | ts Detail | |
| 9 | | | | | | |
| Ť | | Human | Services | Huma | n Services | |
| 10 | TEDM | | ency | | gency | TOTAL |
| 11 12 | TERM POSITION TITLE | FTE | -6/30/18 SALARIES | FTE | 8-6/30/19 SALARIES | 7/1/17-6/30/19 |
| | Resident Services Coordinator | 0.50 | \$31,640 | 0.50 | \$31,640 | \$63,280 |
| 14 | | 0.00 | φσ ι,σ ισ | 0.00 | ψοι,σιο | 400,200 |
| 15 | | | | | | |
| 16 | | | | | | |
| 17 | | | | | | |
| 18 | | | | | | |
| 19 | | | | | | |
| 20 | | | | | | |
| 21 | | | | | | |
| 22 | | | | | | |
| 23 | TOTALS | 0.50 | \$31,640 | 0.50 | \$31,640 | \$63,280 |
| 24 25 | | | | | | |
| | EMPLOYEE FRINGE BENEFITS | 28% | \$8,860 | 28% | \$8,860 | \$17,720 |
| 27 28 | | * | · · · · · · | | , , | , , |
| | TOTAL HSA SALARIES & BENEFITS | | \$40,500 | | \$40,500 | \$81,000 |
| 30 | TOTAL TIGA SALARIES & BEINEFITS | | φ40,300 <u> </u> | | φ40,500 | \$61,000 |
| 31 | DEVELOPER MATCH POSITION TITLE | | | | | |
| | Resident Services Coorindator | 1.00 | \$63,281 | 1.00 | \$63,281 | \$126,562 |
| | Tresident Gervices Coominator | 1.00 | ψυυ,∠υ Ι | 1.00 | ψυυ,ΖΟΙ | φ120,002 |
| 33 | | | | | | |
| 35 | | | | | | |
| 36 | | | | | | |
| 37 | | | | | | |
| 38 | TOTALS | 1.00 | \$63,281 | 1.00 | \$63,281 | \$126,562 |
| 39 | ' | - 1 | | | | |
| 40 | EMPLOYEE FRINGE BENEFITS | 28% | \$17,719 | 28% | \$17,719 | \$35,438 |
| 41 | · | | | | | |
| 42 | TOTAL DEVELOPER SALARIES & BENE | FITS | \$81,000 | | \$81,000 | \$162,000 |
| 43 | TOTAL SALARIES & BENEFITS | 1.50 | \$121,500 | 1.50 | \$121,500 | \$243,000 |
| 44 | | | | | | |
| 45 46 | HSA #2 | | | | | |
| 40 | | | | | | |

| | A | В | С | D | E | F G | Н | |
|----------|--|------------------|--------|---|------------------------------|--------------|------------------------|-------------------------|
| 1 | | U | U | <u>, , , , , , , , , , , , , , , , , , , </u> | <u> </u> | • | App | pendix B-4, Page 3 |
| 2 | | | | | | | Document | Date: 04/25/2017 |
| 3 | Mercy Housing: 1760 | Bush Street | | | | | | |
| 5 | | | | | | | | |
| 6 7 | | | | Ope | rating Expense D | Detail | | |
| 8 | | | | - 60 | | | | |
| _ | | | | | Human Services | Human Servi | ices | TOTAL |
| 9 10 | HSA Expenditure Cate | egory | | TERM | Agency 7/1/17-6/30/18 | 7/1/18-6/30/ | L | TOTAL 7/1/17-6/30/19 |
| | Rental of Property | | | | | | | |
| | Telephone | | | | \$1,000 | | ,000 | \$2,000 |
| | Office Supplies, Posta | ne | | | \$2,000 | | 2,000 | \$4,000 |
| | Maintenance Supplies | _ | | | Ψ2,000 | | | ψ.,σσσ |
| | Printing and Reproduc | | | | | | | |
| | Insurance | MOII | | | | | | |
| | Staff Travel (local) &T | raining | | | \$2,138 | <u></u> | 2,138 | \$4,276 |
| | Law Library | ranniy | | | φ∠,138 | <u> </u> | .,100 | Φ4,∠/0 |
| | Membership/Dues | | | | | | | |
| | · ' | | | | | | | |
| | Rental of Equipment | | | | | - | | |
| 21 22 | Senior Right Bulletin | | | | | - | | |
| 23 | | | | _ | | | | |
| 24 | | | | _ | | | | |
| 25 | OTHER | | | | | | | |
| | Supplies for Monthly C Events, including, but | | | | | | | |
| | Wellness programs, E | | | | | | | |
| | Food & Beverages. Supervision | | | - | \$27,000 \$9,580 | | 7 <u>,000</u> 0,580 | \$54,000 \$19,160 |
| 28 | Supervision | | | - | ψ9,300 | ψο | ,,500 | ψ19,100 |
| 29 | | | | _ | | | | |
| 30 | | | | | | | | |
| | TOTAL HSA OPERAT | ING EXPENSE | | | \$41,718 | \$41 | <u>,718</u> | \$83,436 |
| 32 | | | | | | | | |
| | Developer Match Oper | rating Expense | | | | | | |
| | Rental of Property | | | | | | | |
| | Telephone | | | | | | | |
| | Office Supplies, Posta | | | | | | | |
| 37 | Printing and Reproduc | tion | | | | | | |
| 38 | Insurance | | | | | | | |
| 39 | Law Library | | | | | | | |
| 40 | Membership/Dues | | | | | | | |
| 41 | Rental of Equipment | | | | | | | |
| 42 | Volunteer Expenses (F | Receptionist/int | ake) | | | | | |
| 43 | Client Costs | | | | | | | |
| 44 | Maintenance Supplies | and Repair | | | | | | |
| 45 | Utilities | | | | | | | |
| 46 | Janitorial service & su | pplies | | | | | | |
| 47 | | | | | | | | |
| | TOTAL DEVELOPER | OPERATING E | XPENSE | | \$0 | | \$0 | \$0 |
| 49 50 | TOTAL OPERATING E | EXPENSE | | | \$41,718 | \$41, | 718 | \$83,436 |
| 51 | | | | | . , - | | | . , |
| ۷۷ | HSA #3 | | | | | | | |

| | | | | | Do | | pendix B-4, Page 4 t Date: 04/25/2017 |
|--|------------|--------|----------------------------|-----|----------------------------|-----|--|
| Mercy Housing : 1760 Bush Street (Same as Line 6 on HSA #1) | | | | | | | |
| | | Indire | ect Cost Detail | | | | |
| Salaries and Benefits | | | Human Services Agency | | Human Services Agency | | TOTAL |
| Position Title | TERM | FTE | 7/1/17-6/30/18 SALARIES | FTE | 7/1/18-6/30/19 SALARIES | FTE | 7/1/17-6/30/19 SALARIES |
| 1 dollari Tillo | | | O/ KE/ KI KIE G | | O/ LE/ LI LIEG | | O/ LE/ LI LIEG |
| | | | | | | | |
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| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| EMPLOYEE FRINGE BENEFITS | | % | | % | | | |
| TOTAL SALARIES & BENEFITS | | 70 | | 70 | | | |
| | | l . | • | | • | ı | |
| 2. Operating Cost | | | | | | | |
| Expenditure Category | | | | | | | |
| Q/A Fee i.e Contract Administrator, etc | <u>c</u> . | | \$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

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

- Build tenant base
- Develop neighborhood partnerships

- 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.

- 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.

• 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

- 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.

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.

- 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:

or

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

- A. <u>Program Monitoring</u>: 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 | В | С | D | | | | | | |
|----|---|----------------|-----------------------|----------------------|--|--|--|--|--|--|
| 1 | | <u> </u> | | Appendix B-5, Page 1 | | | | | | |
| 2 | | | Docur | ment Date: 4/25/2017 | | | | | | |
| 3 | HUMAN SERVICES AGENCY | CONTRACT BUDG | GET SUMMARY | | | | | | | |
| 4 | | | | | | | | | | |
| 5 | Contractor's Name | | Contrac | ct Term | | | | | | |
| 6 | Mercy Housing : JFK Towers July 1, 2017 - June 30, 2019 | | | | | | | | | |
| 7 | (Check One) New _X_ Renewal | | | | | | | | | |
| | | No. of Mod. | | | | | | | | |
| | | | | | | | | | | |
| 9 | Program: Rental Assistance Demonstration | | | TOTAL | | | | | | |
| 10 | Budget Reference Page No.(s) | | | | | | | | | |
| | 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 | | | | | | | | | |
| | Salaries & Benefits | \$20,250 | \$20,250 | \$40,500 | | | | | | |
| | Operating Expense | \$38,087 | \$38,087 | \$76,174 | | | | | | |
| | Capital Expenditure | \$0 | \$0 | \$0 | | | | | | |
| | Subtotal | \$58,337 | \$58,337 | \$116,674 | | | | | | |
| | Indirect Percentage (%) | 13% | 13% | 13% | | | | | | |
| | Indirect Cost (Line 16 X Line 17) | \$7,584 | \$7,584 | \$15,168 | | | | | | |
| | Total HSA Expenditures | \$65,921 | \$65,921 | \$131,842 | | | | | | |
| 20 | Developer Match Expenditures | | | | | | | | | |
| | Salaries & Benefits | \$81,000 | \$81,000 | \$162,000 | | | | | | |
| | Operating Expense | \$0 | \$0 | \$0 | | | | | | |
| | Capital Expenditure | \$0 | \$0 | \$0 | | | | | | |
| | 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 | | | | | | | | | |
| | Local General Fund | \$65,921 | \$65,921 | \$131,842 | | | | | | |
| 29 | | | | | | | | | | |
| 30 | | | | | | | | | | |
| 31 | | | | | | | | | | |
| 32 | | | | | | | | | | |
| 33 | TOTAL HSA REVENUES | \$65,921 | \$65,921 | \$131,842 | | | | | | |
| 35 | Developer Revenues | ΨΟΟ,321 | ΨΟΟ, 32 Ι | Ψ101,042 | | | | | | |
| 36 | Developer Revenues Developer Match Funds | \$81,000 | \$81,000 | \$162,000 | | | | | | |
| 37 | Developer Materia unus | Ψ01,000 | ψ01,000 | ψ102,000 | | | | | | |
| 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 | - | Геlephone No. (415) 3 | 355-7120 | | | | | | |
| 45 | HSA-CO Review Signature: | | | | | | | | | |
| 46 | HSA #1 | | | | | | | | | |
| 47 | πι | | | | | | | | | |
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| | A | В | С | D | Е | F |
|----------|---------------------------------|------|------------------|-----------|--------------------|--|
| 2 | | | | | | opendix B-5, Page 2 ent Date: 4/25/2017 |
| 3 | | | | | Docum | eni Dale: 4/25/2017 |
| 4 | Mercy Housing : JFK Towers | | | | | |
| 5 6 | | | | | | |
| | | | Salaries 8 | Ponofi | to Dotail | |
| 7 8 | | | Salaries o | k Dellell | is Detail | |
| 9 | | | | | | |
| | | | Services | | n Services | |
| 10 11 | TERM | | ency -6/30/18 | | gency 8-6/30/19 | TOTAL 7/1/17-6/30/19 |
| 12 | POSITION TITLE | FTE | SALARIES | FTE | SALARIES | 7/1/17-0/30/19 |
| 13 | Resident Services Coordinator | 0.25 | \$15,820 | 0.25 | \$15,820 | \$31,640 |
| 14 | | | | | | |
| 15 | | | | | | |
| 16 | | | | | | |
| 17 | | | | | | |
| 18 | | | | | | |
| 19 | | | | | | |
| 20 | | | | | | |
| 21 | | | | | | |
| 22 | | | | | | |
| 23 | TOTALS | 0.25 | \$15,820 | 0.25 | \$15,820 | \$31,640 |
| 24 | | • | • | • | • | |
| 25 | EMPLOYEE FRINGE BENEFITS | 28% | \$4,430 | 28% | \$4,430 | \$8,860 |
| 27 | LIMI LOTEL TRINGE BENEFITS | 2076 | ψ4,430 | 2076 | Ψ4,430 [| ψ0,000 |
| 28 | ſ | | | | | |
| | TOTAL HSA SALARIES & BENEFITS | | \$20,250 | | \$20,250 | \$40,500 |
| 30 | | | | | | |
| 31 | DEVELOPER MATCH | | | | | |
| 32 | POSITION TITLE | | | 1 | | |
| 33 | Resident Services Coorindator | 1.00 | \$63,281 | 1.00 | \$63,281 | \$126,562 |
| 34 | | | | | | |
| 35 | | | | | | |
| 36 | | | | | | |
| 37 | | | | | | |
| 38 | TOTALS | 1.00 | \$63,281 | 1.00 | \$63,281 | \$126,562 |
| 40 | 101/120 | 1.00 | ψυυ,201 | 1.00 | ψυυ,201 | ψ120,002 |
| | EMPLOYEE FRINGE BENEFITS | 28% | \$17,719 | 28% | \$17,719 | \$35,438 |
| 42 | | | , | -2.0 | , | |
| | TOTAL DEVELOPER SALARIES & BENE | FITS | \$81,000 | | \$81,000 | \$162,000 |
| 44 | TOTAL SALARIES & BENEFITS | 1.25 | \$101,250 | 1.25 | \$101,250 | \$202,500 |
| 45 | | | | | | |
| 46 47 | HSA #2 | | | | | |
| 47 | | | | | | |

| | A B C I | D E | F G I | Н І |
|----------|---|-----------------------|-----------------------|----------------------|
| 1 | | | | Appendix B-5, Page 3 |
| 3 | | | Docu | ment Date: 4/25/2017 |
| 4 | Mercy Housing : JFK Towers | | | |
| 5 6 | | | | |
| 7 | o | perating Expense | Detail | |
| 8 | | | | |
| 9 | | Human Services Agency | Human Services Agency | TOTAL |
| _ | HSA Expenditure Category TEI | | 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 | | | |
| | Membership/Dues | | | |
| | Rental of Equipment | | | |
| | Senior Right Bulletin | | <u> </u> | - |
| 22 | | | | |
| 23 | | | · —— | |
| 24 | | | · ——— | - |
| | OTHER | | 0.4.500 | 40.000 |
| 26 | Supplies for Monthly Community Projects & Events Supervision | 8,997 | | 49,000 17,994 |
| 28 | <u> </u> | | 0,001 | 17,001 |
| 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 | | | |
| | 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 | | | |
| 47 | TOTAL DEVELOPER OPERATIVE EVERYOR | ** | A C | * |
| 48 49 | TOTAL DEVELOPER OPERATING EXPENSE | \$0 | \$0 | \$0 |
| 50 | TOTAL OPERATING EXPENSE | \$38,087 | \$38,087 | \$76,174 |
| 51 52 | HSA #3 | | | |
| 53 | | | | |

| | | | | | | A Docume | ppendix B, Page 4 nt Date: 4/25/2017 |
|--|----------|--------|--------------------------|-----|--------------------------|-------------|---|
| Mercy Housing : JFK Towers (Same as Line 6 on HSA #1) | | | | | | | |
| | | Indire | ect Cost Detail | | | | |
| Salaries and Benefits | | | Human Services Agency | | Human Services Agency |] . | TOTAL |
| | TERM | СТС | 7/1/17-6/30/18 | СТС | 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 | | | | | | | |
| | | | | | | | |
| Operating Cost | | | | | | | |
| Expenditure Category | | | • | | *- | | • |
| Q/A Fee i.e Contract Administrator, etc | . | | \$7,584 | | \$7,584 | | \$15,168 |
| | | | | | | | |
| | • | | | | | | |
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| | i | | | | | - | |
| | • | | | | | | |
| TOTAL OPERATING COST | | | \$7,584 | | \$7,584 | | \$15,168 |
| | | | | | | | |
| TOTAL INDIRECT COST | | | \$7,584 | | \$7,584 | | \$15,168 |
| (Salaries & Benefits + Operating Cost) | | | | | | | |
| 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

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

- Build tenant base
- Develop neighborhood partnerships

- 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.

- 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.

• 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

- 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.

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.

- 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:

or

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

- A. <u>Program Monitoring</u>: 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.

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| 1 | | | | Appendix B-6, Page 1 | | |
| 2 | Document Date: 04/25/2017 | | | | | |
| 3 | HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY | | | | | |
| 4 | | | | | | |
| 5 | | | | | | |
| 6 | Mercy Housing : 2698 California | | July 1, 2017 | June 30, 2019 | | |
| 7 | | | | | | |
| 8 | If modification, Effective Date of Mod. N | | | | | |
| | | | | | | |
| 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 | | |
| | Operating Expense | \$21,508 | \$21,508 | \$43,016 | | |
| | Capital Expenditure | \$0 | \$0 | \$0 | | |
| | 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 | | |
| - | Operating Expense | \$0 | \$0 | \$0 | | |
| | Capital Expenditure | \$0 | \$0 | \$0 | | |
| | | \$60,750 | \$60,750 | \$121,500 | | |
| 25 | | ¥ = 1, = 1 | ¥ , | · / | | |
| - | Total HSA and Developer Expenditures | \$107,937 | \$107,937 | \$215,874 | | |
| 27 | HSA Revenues | 1 | , , , , , , , , , , , , , , , , , , , | * -/- | | |
| - | Local General Fund | \$47,187 | \$47,187 | \$94,374 | | |
| 29 | 2000. 20110. 4114 | \$, | ψ,.σ. | φο .,σ | | |
| 30 | | | | | | |
| 31 | | | | | | |
| 32 | | | | | | |
| 33 | | | | | | |
| 34 | TOTAL HSA REVENUES | \$47,187 | \$47,187 | \$94,374 | | |
| 35 | Developer Revenues | | | · | | |
| | 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 | ΠΟΛ #1 | | | | | |
| | | | | | | |

| | Α | В | С | D | Е | F |
|----------|---------------------------------|---------|---------------------|----------|---------------------|--|
| 2 | | | | | | opendix B-6, Page 2 nt Date: 04/25/2017 |
| 3 | | | | | Documer | II Date. 04/25/2017 |
| 4 | Mercy Housing : 2698 California | | | | | |
| 5 | | | | | | |
| 6 | | | | | | |
| 7 | | | Salaries 8 | k Benefi | ts Detail | |
| 8 | | | | | | |
| 9 | Human Services Human Services | | | | | |
| 10 | | Ag | ency | A | gency | TOTAL |
| 11 | TERM | | -6/30/18 | | 8-6/30/19 | 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 | \$31,640 |
| 14 | | | | | | |
| 15 | | | | | | |
| 16 | | | | | | |
| 17 | | | | | | |
| 18 | | | | | | |
| 19 | | | | | | |
| | | | | | | |
| 20 | | | | | | |
| 21 | | | | | | |
| 22 | | | | | | |
| 23 | TOTALS | 0.25 | \$15,820 | 0.25 | \$15,820 | \$31,640 |
| 24 25 | | | | | | |
| | EMPLOYEE FRINGE BENEFITS | 28.0% | \$4,430 | 28.0% | \$4,430 | \$8,860 |
| 27 | LIMPLOTEE I KINGE BENEFTIS | 20.0 /6 | Ψ 4 ,430 | 20.076 | φ 4 ,430 | φο,οου |
| 28 | | | | 1 | | |
| 29 | TOTAL HSA SALARIES & BENEFITS | | \$20,250 | | \$20,250 | \$40,500 |
| 30 | | | | | | |
| 31 | DEVELOPER MATCH POSITION TITLE | | | | | |
| | Resident Services Coorindator | 0.75 | \$47,460 | 0.75 | \$47,460 | \$94,920 |
| 33 | | | , ., | | , ,,,,, | +, |
| 34 | | | | | | |
| | | | | | | |
| 35 | | | | | | |
| 36 | | | | | | |
| 37 | | | | | | |
| 38 | TOTALS | 0.75 | \$47,460 | 0.75 | \$47,460 | \$94,920 |
| 39 | | | Т | 1 | Т | |
| 40 | EMPLOYEE FRINGE BENEFITS | 28.0% | \$13,290 | 28.0% | \$13,290 | \$26,580 |
| 41 | | | | | | |
| 42 | TOTAL DEVELOPER SALARIES & BENE | FITS | \$60,750 | | \$60,750 | \$121,500 |
| | TOTAL SALARIES & BENEFITS | 1.00 | \$81,000 | 1.00 | \$81,000 | \$162,000 |
| 44 | | | # 0.,000 | | 40.,000 | Ţ.J <u>Z</u> , |
| | HSA #2 | | | | | |
| 46 | | | | | | |

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| 2 | | | | ppendix B-6, Page 3 nt Date: 04/25/2017 | | |
| 3 | | | Docume | 111 Bate: 04/20/2017 | | |
| <u>4</u> 5 | Contractor's Name: Mercy Housing | | | | | |
| 6 | _ | | | | | |
| 7 8 | Operating Expense Detail Human Services Human Services | | | | | |
| 9 | | Agency | 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 | | | | | |
| 13 | Office Supplies, Postage | 1,200 | 1,200 | 2,400 | | |
| 14 | Maintenance Supplies and Repair | | | | | |
| 15 | Printing and Reproduction | | | | | |
| 16 | Insurance | | | | | |
| 17 | Staff Travel (local) &Training | 1,348 | 1,348 | 2,696 | | |
| 18 | Law Library | | | | | |
| 19 | Membership/Dues | | | | | |
| 20 | Rental of Equipment | | | | | |
| 21 | Senior Right Bulletin | | | | | |
| 22 | | | | | | |
| 23 24 | | | | | | |
| | OTHER | • | | | | |
| | Supplies for Monthly Community Projects & Events. Inc | 10,000 | 10,000 | 20,000 | | |
| 27 | Supervision | 8,960 | 8,960 | 17,920 | | |
| 28 29 | | | | | | |
| 30 | | . | | | | |
| 31 | TOTAL HSA OPERATING EXPENSE | \$21,508 | \$21,508 | \$43,016 | | |
| 32 | | | | | | |
| 33 | Developer Match Operating Expense | | | | | |
| 34 | Rental of Property | | | | | |
| 35 | Telephone | | | | | |
| 36 | Office Supplies, Postage | | | | | |
| 37 | Printing and Reproduction | | | | | |
| | 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 49 | TOTAL DEVELOPER OPERATING EXPENSE | \$0_ | \$0 | \$0 | | |
| 50 | TOTAL OPERATING EXPENSE | \$21,508 | \$21,508 | \$43,016 | | |
| 51 52 | HSA #3 | | | | | |
| 53 | | | | | | |

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.

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 supervise1 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.

- 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.

- 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.

- 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.

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.

- 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:

or

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

- A. <u>Program Monitoring</u>: 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 | В | С | D | | | |
|----------|--|-------------------|---------------------|----------------------|--|--|--|
| 1 | | | - | ppendix B-1, Page 1 | | | |
| 2 | | | | nent Date: 4/13/2017 | | | |
| 3 | HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY | | | | | | |
| 4 | BY PROGRAM | | | | | | |
| H | | DI FROGRA | | | | | |
| 5 | Contractor's Name | | Contract | t Term | | | |
| 6 | Tenderloin Neighborhood Development Corp | oration | July 1, 2017-J | une 30, 2019 | | | |
| 7 | (Check One) New X Renewal | Modification | • | | | | |
| | , | - - - | | | | | |
| 8 | If modification, Effective Date of Mod. N | lo. of Mod. | <u> </u> | | | | |
| ١ | Program: Rental Assistance Demonstration - 93 | 0-51 Eddy Stroot | | TOTAL | | | |
| | | 3-31 Ludy Street | | TOTAL | | | |
| | Budget Reference Page No.(s) | | | | | | |
| | Program Term | 7/1/17-6/30/18 | 7/1/18-6/30/19 | 7/1/17-6/30/19 | | | |
| 12 | , | | | | | | |
| | Salaries & Benefits | \$0 | \$0 | \$0 | | | |
| | Operating Expense | \$30,129 | \$30,129 | \$60,258 | | | |
| | Capital Expenditure Subtotal | \$0 \$30,129 | \$0 \$30,129 | \$0 \$60,258 | | | |
| | Indirect Percentage (%) | | | | | | |
| | | 6% | 6% | 6% | | | |
| | Indirect Cost (Line 16 X Line 17) | \$1,808 | \$1,808 \$24,027 | \$3,616 | | | |
| | Total HSA Expenditures Developer Match Expenditures | \$31,937 | \$31,937 | \$63,874 | | | |
| 20 | Salaries & Benefits | φη. | 0.9 | ΦΩ. | | | |
| | Operating Expense | \$0 \$76,415 | \$0 \$76,415 | \$0 \$152,830 | | | |
| | Capital Expenditure | 0 | 970,413 | \$152,630 | | | |
| | Subtotal | \$76,415 | \$76,415 | \$152,830 | | | |
| | Indirect Percentage (%) | 6% | 6% | | | | |
| | Indirect Cost (Line 16 X Line 17) | \$4,585 | \$4,585 | 6% \$9,170 | | | |
| _ | Total Developer Expenditures | \$81,000 | \$81,000 | \$162,000 | | | |
| 28 | Total Beveloper Experiences | φοι,σσσ | ψ01,000 | Ψ102,000 | | | |
| | Total HSA and Developer Expenditures | \$112,937 | \$112,937 | \$225,874 | | | |
| 30 | HSA Revenues | ψ.: <u>-</u> ,σσ. | ψ=,σσ. | Ψ==0,0: : | | | |
| | Local General Fund | \$31,937 | \$31,937 | \$63,874 | | | |
| 32 | 2000. 20.10.0. | ψο : ,σο: | φσ.,σσ. | φοσ,σ | | | |
| 33 | | | | | | | |
| 34 | | | | | | | |
| 35 | | | | | | | |
| 36 | | | | | | | |
| 37 | | | | | | | |
| 38 | TOTAL LIGA DEVENUES | *** | *** *** | *** | | | |
| 39 | TOTAL HSA REVENUES | \$31,937 | \$31,937 | \$63,874 | | | |
| 40 | Developer Revenues | Ф04.000 | # 04.005 | # 400 000 | | | |
| 41 42 | Developer Match Funds | \$81,000 | \$81,000 | \$162,000 | | | |
| 43 | | | | | | | |
| 44 | | | | | | | |
| 45 | Total Developer Revenues | \$81,000 | \$81,000 | \$162,000 | | | |
| 46 | | \$112,937 | \$112,937 | \$225,874 | | | |
| | Full Time Equivalent (FTE) | ψ112,937 | Ψ112,331 | Ψ223,074 | | | |
| | · | <u> </u> | Falanhar - N- | Doto | | | |
| | Prepared by: Paul Sussman HSA-CO Review Signature: | | Telephone No. | Date | | | |
| | _ | | | | | | |
| | HSA #1 | | | | | | |
| 52 | | | | | | | |

| | A B C | D | E F | G H |
|----------|--|--------------------|----------------|-----------------------|
| 1 | | • | | Appendix B-1, Page 2 |
| 3 | | | Doc | ument Date: 4/13/2017 |
| 4 | Tenderloin Neighborhood Development Co | orporation | | |
| <u>5</u> | | | | |
| 7 | Оре | erating Expense De | etail | |
| 8 | | Human Services | Human Services | |
| 9 | | Agency | Agency | TOTAL |
| 10 | HSA Expenditure Category TER | M 7/1/17-6/30/18 | 7/1/18-6/30/19 | 7/1/17-6/30/19 |
| 11 | Rental of Property | | | |
| 12 | Telephone | | | |
| 13 | Office Supplies, Postage | | | |
| 14 | Maintenance Supplies and Repair | | | |
| 15 | Printing and Reproduction | | | |
| 16 | Insurance | | | |
| 17 | Staff Travel (local) &Training | | | |
| 18 | Law Library | | | |
| 19 | Membership/Dues | | | |
| 20 | Rental of Equipment | | | |
| 21 | Senior Right Bulletin | | | |
| 22 | Sub-Contractor (NCPHS) | 30,129 | 30,129 | 60,258 |
| 23 | | | | - |
| 24 | OTHER | - | - | - |
| 26 | OTHER | | | |
| 27 | | | | |
| 28 | | | | |
| 29 30 | | | | |
| 31 | TOTAL HSA OPERATING EXPENSE | \$30,129 | \$30,129 | \$60,258 |
| 32 | | | | |
| | Developer Match Operating Expense | | | |
| | Rental of Property | | | |
| | Telephone | | | |
| | Office Supplies, Postage | • | | - |
| | Printing and Reproduction | - | | - |
| | Insurance | | | |
| | Law Library | | · | |
| | Membership/Dues | | · | |
| | Rental of Equipment | | | - |
| 42 | | | | - |
| | Client Costs | | | - |
| | Maintenance Supplies and Repair | | · | |
| | Utilities | - | | - |
| | Janitorial service & supplies | - | | - |
| | Sub-Contractor (NCPHS) | 76,415 | 76,415 | 152,830 |
| 48 | (10.110) | 10,110 | 10,110 | .02,000 |
| | TOTAL DEVELOPER OPERATING EXPE | EN: \$76,415 | \$76,415 | \$152,830 |
| 50 | | | | |
| 51 52 | TOTAL OPERATING EXPENSE | \$106,544 | \$106,544 | \$213,089 |
| 53 | HSA #3 | | | |
| 54 | | | | |

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.

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.

- 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.

- 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.

- 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.

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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.

- 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:

or

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

- A. <u>Program Monitoring</u>: 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 | В | С | D | | | |
|----------|---|---|-----------------|------------------------|--|--|--|
| 1 | | | | Appendix B-2, Page 1 | | | |
| 2 | | | Doo | cument Date: 4/13/2017 | | | |
| 3 | HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY | | | | | | |
| 4 | BY PROGRAM | | | | | | |
| 5 | Contractor's Name Contract Term | | | | | | |
| | Tandarlain Naighbarhaad Davalanmant Carr | lub 4 2017 | luna 20, 2010 | | | | |
| | | | | | | | |
| 7 | (Check One) NewX_ Renewal | Modification | | | | | |
| 8 | If modification, Effective Date of Mod. N | lo. of Mod. | | | | | |
| _ | Drawram, Dantal Assistance Demonstration 42 | O Turk Chroot | | TOTAL | | | |
| | Program: Rental Assistance Demonstration - 43 | o ruik Street | | TOTAL | | | |
| | Budget Reference Page No.(s) | | | | | | |
| | 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 | 4- | | | | | |
| | Salaries & Benefits | \$0 | \$0 | \$0 | | | |
| | Operating Expense | \$60,929 | \$60,929 | \$121,858 | | | |
| | Capital Expenditure Subtotal | \$0 \$60,929 | \$0 \$60,929 | \$0 \$121,858 | | | |
| | Indirect Percentage (%) | | | | | | |
| | Indirect Cost (Line 16 X Line 17) | 4.5% | 4.5% | 4.5% \$5,484 | | | |
| | Total HSA Expenditures | \$2,742 | \$2,742 | ' ' | | | |
| | Developer Match Expenditures | \$63,671 | \$63,671 | \$127,342 | | | |
| 20 21 | Salaries & Benefits | \$0 | \$0 | \$0 | | | |
| _ | Operating Expense | \$77,512 | \$77,512 | \$155,024 | | | |
| | Capital Expenditure | 0 | 0 | \$133,024 | | | |
| | Subtotal | \$77,512 | \$77,512 | \$155,024 | | | |
| | Indirect Percentage (%) | | | | | | |
| ì | Indirect Cost (Line 16 X Line 17) | 4.5% \$3,488 | 4.5% \$3,488 | 4.5% \$6,976 | | | |
| | Total Developer Expenditures | \$81,000 | \$81,000 | \$162,000 | | | |
| 28 | Total Beveloper Experiences | ψ01,000 | φο1,000 | Ψ102,000 | | | |
| | Total HSA and Developer Expenditures | \$144,671 | \$144,671 | \$289,342 | | | |
| 30 | HSA Revenues | , , , , , , , , , , , , , , , , , , , | | | | | |
| | Local General Fund | \$63,671 | \$63,671 | \$127,342 | | | |
| 32 | 2000. 00.10.0. | 400,01. | Ψοσ,σ | ψ·Ξ·;σ·Ξ | | | |
| 33 | | | | | | | |
| 34 | | | | | | | |
| 35 | | | | | | | |
| 36 | | | | | | | |
| 37 38 | | | | | | | |
| | TOTAL LIGA DEVENIUES | #00.074 | #00.074 | 0407.040 | | | |
| 39 | TOTAL HSA REVENUES | \$63,671 | \$63,671 | \$127,342 | | | |
| 40 | Developer Revenues | Ф04 000 | #04.000 | # 400,000 | | | |
| 41 42 | Developer Match Funds | \$81,000 | \$81,000 | \$162,000 | | | |
| 43 | | | | | | | |
| 44 | | | | | | | |
| 45 | Total Developer Revenues | \$81,000 | \$81,000 | \$162,000 | | | |
| 46 | Total Revenues | \$144,671 | \$144,671 | \$289,342 | | | |
| | | * * * * * * * * * * * * * * * * * * * | Ţ , | + | | | |
| 47 | Full Time Equivalent (FTE) | | | | | | |
| 49 | Prepared by: Paul Sussman | • | Telephone No. | Date | | | |
| 50 | HSA-CO Review Signature: | | | | | | |
| | - | | | • | | | |
| 52 | HSA #1 | | | | | | |

| | A B C | D | Е | F G | Н |
|----------|--|-------|----------------|----------------|-------------------------|
| 1 | • | | | | Appendix B-2, Page 2 |
| 3 | | | | D | ocument Date: 4/13/2017 |
| 4 | Tenderloin Neighborhood Development Corpor | ation | | | |
| 5 6 | | | | | |
| 7 | | Ope | rating Expense | e Detail | |
| 8 | | | Human Services | Human Service | s |
| 9 | | | Agency | 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 | | | | |
| 13 | Office Supplies, Postage | | | | |
| 14 | Maintenance Supplies and Repair | | | | |
| 15 | Printing and Reproduction | | | _ | |
| 16 | Insurance | | | _ | |
| 17 | Staff Travel (local) &Training | | | <u> </u> | |
| 18 | Law Library | | | _ | |
| 19 | Membership/Dues | | | _ | _ |
| 20 | Rental of Equipment | | | <u> </u> | |
| 21 | Senior Right Bulletin | | | | |
| 22 | Sub-Contractor (NCPHS) | _ | 60,929 | 60,92 | 9 121,858 |
| 23 | | _ | | | |
| 24 | 07.170 | _ | | | _ |
| 25 26 | OTHER | | | | |
| 27 | | _ | | | |
| 28 | | _ | | | |
| 29 30 | | _ | | _ | _ |
| 31 | TOTAL HSA OPERATING EXPENSE | | \$60,929 | \$60,92 | 9 \$121,858 |
| 32 | TOTAL FIGA OF ENATING EXITENSE | | Ψ00,923 | 900,92 | 9 |
| | Developer Match Operating Expense | | | | |
| | | | | | |
| | Telephone | | | _ | _ |
| | · | | | _ | _ |
| 36 | Office Supplies, Postage | | | _ | _ |
| | Printing and Reproduction | | | | |
| | Insurance | | | | |
| 39 | | | | | |
| | Membership/Dues | | | | |
| 41 | Rental of Equipment | | | _ | _ |
| | Volunteer Expenses (Receptionist/intake) | | | _ | _ |
| | Client Costs | | | | |
| | Maintenance Supplies and Repair | | | | |
| | Utilities | | | | |
| | Janitorial service & supplies | | | | 0 455.001 |
| 47 | Sub-Contractor (NCPHS) | | 77,512 | 2 77,51 | 2 155,024 |
| 48 | TOTAL DEVELOPED OPERATING EVERYOR | | M77 546 | , A | 0 #455.004 |
| 49 50 | TOTAL DEVELOPER OPERATING EXPENSE | | \$77,512 | 2 \$77,51 | 2 \$155,024 |
| 51 | TOTAL OPERATING EXPENSE | | \$138,441 | \$138,44 | 1 \$276,882 |
| 52 53 | HSA #3 | | | | |
| 54 | | | | | |

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).

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.

- 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.

- 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.

- 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.

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.

- 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:

or

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

- A. <u>Program Monitoring</u>: 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.

| 14 Operating Expense | | A | В | С | D | | |
|--|----|---|-----------------------|-----------------|--|--|--|
| HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY BY PROGRAM | 1 | | | Ā | ppendix B-3, Page 1 | | |
| Contract Term | 2 | | | Docum | nent Date: 4/13/2017 | | |
| Contract Term | 3 | HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY | | | | | |
| Tenderloin Neighborhood Development Corporation | 4 | | BY PROGRAI | И | | | |
| Check One | 5 | Contractor's Name | | Contract | Term | | |
| Check One | 6 | Tenderloin Neighborhood Development Corp | ooration | July 1, 2017-Ju | ıne 30, 2019 | | |
| Program: Rental Assistance Demonstration - Rosa Parks | | - | • | • | , | | |
| Program: Rental Assistance Demonstration - Rosa Parks | 8 | If modification, Effective Date of Mod. N | o. of Mod. | | | | |
| Budget Reference Page No.(s) | | · | | | | | |
| Program Term | 9 | Program: Rental Assistance Demonstration - Ro | sa Parks | | TOTAL | | |
| Human Services Agency Expenditures \$0 \$0 \$0 \$1 | | | | | | | |
| Salaries & Benefits \$0 | | | 7/1/17-6/30/18 | 7/1/18-6/30/19 | 7/1/17-6/30/19 | | |
| 14 Operating Expense | 12 | Human Services Agency Expenditures | | | | | |
| 15 Capital Expenditure \$0 \$0 \$0 \$\$ Subtotal \$127,253 \$127,253 \$254,500 Indirect Percentage (%) | 13 | Salaries & Benefits | | | \$0 | | |
| Subtotal | | | \$127,253 | \$127,253 | \$254,506 | | |
| Indirect Percentage (%) | 15 | Capital Expenditure | \$0 | \$0 | \$0 | | |
| 18 | 16 | Subtotal | \$127,253 | \$127,253 | \$254,506 | | |
| 18 | 17 | Indirect Percentage (%) | 4% | 4% | 4% | | |
| 19 Total HSA Expenditures \$132,343 \$132,343 \$264,686 20 Developer Match Expenditures \$0 | | | | | | | |
| Developer Match Expenditures \$0 | | | | +-, | | | |
| Salaries & Benefits | _ | | ψ132,3 4 3 | Ψ132,343 | Ψ204,000 | | |
| 22 Operating Expense \$155,769 \$155,769 \$311,532 Sapital Expenditure \$0 | | • | * | C O | Φ.C | | |
| 23 Capital Expenditure \$0 | | | | | • | | |
| 24 Subtotal \$155,769 \$155,769 \$311,53 \$25 Indirect Percentage (%) 4% 4% 4% 4% 49% | | | | | \$311,538 | | |
| 25 | | | ' ' | | \$0 | | |
| 26 Indirect Cost (Line 16 X Line 17) \$6,231 \$12,462 27 Total Developer Expenditures \$162,000 \$162,000 \$324,000 28 | | | \$155,769 | \$155,769 | \$311,538 | | |
| 26 Indirect Cost (Line 16 X Line 17) \$6,231 \$12,462 27 Total Developer Expenditures \$162,000 \$162,000 \$324,000 28 | 25 | Indirect Percentage (%) | 4% | 4% | 4% | | |
| Total Developer Expenditures \$162,000 \$162,000 \$324,000 | | | | \$6,231 | \$12,462 | | |
| 28 | | | | | \$324,000 | | |
| 29 Total HSA and Developer Expenditures \$294,343 \$294,343 \$588,686 \$30 HSA Revenues \$132,343 \$132,343 \$264,686 \$32 \$33 \$34 \$35 \$36 \$37 \$38 \$38 \$39 \$70TAL HSA REVENUES \$132,343 \$132,343 \$264,686 \$38 \$39 \$70TAL HSA REVENUES \$132,343 \$132,343 \$264,686 \$39 \$40 | | | ¥:0=,000 | ¥ : 0=,000 | ************************************* | | |
| 30 | | Total HSA and Developer Expenditures | \$294 343 | \$204 343 | \$588 686 | | |
| 31 Local General Fund | _ | | Ψ254,545 | Ψ204,040 | Ψ300,000 | | |
| 32 | | | | | | | |
| 33 | - | Local General Fund | \$132,343 | \$132,343 | \$264,686 | | |
| 34 | | | | | | | |
| 35 | | | | | | | |
| 36 | | | | | | | |
| 37 | | | | | | | |
| 38 | | | | | | | |
| 39 TOTAL HSA REVENUES \$132,343 \$132,343 \$264,686 40 Developer Revenues | | | | | | | |
| Developer Revenues \$162,000 \$162,000 \$324,000 | 38 | | | | | | |
| 41 Developer Match Funds \$162,000 \$162,000 \$324,000 42 43 44 45 46 46 46 47 Total Revenues \$162,000 \$162,000 \$324,000 46 46 47 47 Total Revenues \$294,343 \$294,343 \$588,680 48 Full Time Equivalent (FTE) 2.50 2.50 2.50 2.50 48 | 39 | TOTAL HSA REVENUES | \$132,343 | \$132,343 | \$264,686 | | |
| 41 Developer Match Funds \$162,000 \$162,000 \$324,000 42 43 44 45 46 46 46 47 Total Revenues \$162,000 \$162,000 \$324,000 46 46 47 47 Total Revenues \$294,343 \$294,343 \$588,680 48 Full Time Equivalent (FTE) 2.50 2.50 2.50 2.50 48 | 40 | Developer Revenues | | | | | |
| 42 43 44 45 45 Total Developer Revenues \$162,000 \$162,000 46 \$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 | | | \$162,000 | \$162,000 | \$324,000 | | |
| 43 \$14 \$162,000 \$162,000 \$324,000 45 Total Developer Revenues \$162,000 \$324,000 46 \$294,343 \$294,343 \$588,680 48 Full Time Equivalent (FTE) \$2.50 \$2.50 50 Prepared by: Paul Sussman Telephone No. 51 HSA-CO Review Signature: \$48 HSA-TA | | • | 7 - 7-22 | 7 - 7 | + - , | | |
| 44 \$162,000 \$162,000 \$324,000 46 \$294,343 \$294,343 \$588,680 48 Full Time Equivalent (FTE) \$2.50 \$2.50 50 Prepared by: Paul Sussman Telephone No. 51 HSA-CO Review Signature: \$48 | | | | | | | |
| 45 Total Developer Revenues \$162,000 \$324,000 46 47 Total Revenues \$294,343 \$294,343 \$588,680 48 Full Time Equivalent (FTE) 2.50 2.50 50 Prepared by: Paul Sussman Telephone No. 51 HSA-CO Review Signature: 52 HSA #1 | _ | | | | | | |
| 46 \$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 | | Total Developer Revenues | \$162,000 | \$162,000 | \$324,000 | | |
| 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 | 46 | · | | | | | |
| 48 Full Time Equivalent (FTE) 50 Prepared by: Paul Sussman Telephone No. HSA-CO Review Signature: 52 HSA #1 | 47 | Total Revenues | \$294,343 | \$294,343 | \$588,686 | | |
| 50 Prepared by: Paul Sussman Telephone No. 51 HSA-CO Review Signature: 52 HSA #1 | 48 | | | | | | |
| 51 HSA-CO Review Signature: 52 HSA #1 | | 1 | | | | | |
| 52 HSA #1 | | , | i dai Odooman I | Ciopriorio 140. | | | |
| | | · · | | | | | |
| | 52 | HSA #1 | | | | | |
| | | | | | | | |

| | A B C | D | Е | F | G | н і |
|---------------|---|--------|----------------|-------|----------------|-----------------------|
| 1 | | | | | D | Appendix B-3, Page 2 |
| 3 | | | | | Docu | ument Date: 4/13/2017 |
| <u>4</u> 5 | Tenderloin Neighborhood Development Corpo | ration | | | | |
| 6 | | | | | | |
| 7 | | Ope | rating Expens | se De | etail | |
| 8 | | | Human Service | 25 | Human Services | |
| 9 | | | Agency | | Agency | TOTAL |
| 10 | HSA Expenditure Category | TERM | 7/1/17-6/30/18 | 3 | 7/1/18-6/30/19 | 7/1/17 - 6/30/19 |
| 11 | Rental of Property | | | _ | | |
| 12 | Telephone | | | | | |
| 13 | Office Supplies, Postage | | | | | |
| 14 | Maintenance Supplies and Repair | | | _ | | |
| 15 | Printing and Reproduction | | | | | |
| 16 | Insurance | | | | | |
| 17 | Staff Travel (local) &Training | | | | | |
| 18 | Law Library | | | | | |
| 19 | Membership/Dues | | | | | |
| 20 | Rental of Equipment | | | | | |
| 21 | Senior Right Bulletin | | | | | |
| 22 | Sub-Contractor (NCPHS) | | \$127,2 | 253 | \$127,253 | \$254,506 |
| 23 24 | | _ | | | | |
| 25 | OTHER | _ | | | | |
| 26 | · · · · · · · · · · · · · · · · · · · | | | | | |
| 27 | | | | | | |
| 28 29 | | _ | | _ | | |
| 30 | | | | _ | | |
| 31 | TOTAL HSA OPERATING EXPENSE | | \$127,2 | 253 | \$127,253 | \$254,506 |
| 32 | | | | | | |
| 33 | Developer Match Operating Expense | | | | | |
| | Rental of Property | | | | | |
| | Telephone | | | | | |
| 36 | | | | | | |
| | Printing and Reproduction | | | | | |
| | Insurance | | | | | |
| | Law Library | | | | | |
| | Membership/Dues | | | | | |
| 41 | Rental of Equipment | | | | | |
| 42 | Volunteer Expenses (Receptionist/intake) | | | | | |
| | Client Costs | | | | | |
| | Maintenance Supplies and Repair | | | | | |
| 45 | ''' | | | | | |
| 46 | | | | | | |
| 47 | Sub-Contractor (NCPHS) | | \$155,7 | 69 | \$155,769 | \$311,538 |
| 48 | , | | | | | , |
| 49 | TOTAL DEVELOPER OPERATING EXPENSE | ≣ | \$155,7 | '69 | \$155,769 | \$311,538 |
| 50 | | | | | | |
| 51 52 | TOTAL OPERATING EXPENSE | | \$283,0 | 122 | \$283,022 | \$566,044 |
| 53 54 | HSA #3 | | | | | |
| 54 | | | | | | |

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.

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.

- 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.

- 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.

- 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.

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.

- 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:

or

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

- A. <u>Program Monitoring</u>: 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. <u>Fiscal Compliance and Contract Monitoring</u>: 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.

| | l A | В | С | D | |
|----------|---|-------------------|----------------|-----------------------|--|
| 1 | | ь | _ | ppendix B-4, Page 1 | |
| 2 | | | | nent Date: 4/13/2017 | |
| | | | | | |
| 3 | HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY | | | | |
| 4 | | BY PROGRAM | | | |
| 5 | Contractor's Name | | Contra | ct Term | |
| 6 | Tandarlain Naighbarhaad Davalanmant Car | luly 1 2017 | luno 20, 2010 | | |
| | Tenderloin Neighborhood Development Cor | | July 1, 2017- | June 30, 2019 | |
| 7 | (Check One) NewX Renewal | Modification | | | |
| 8 | If modification, Effective Date of Mod. | lo. of Mod. | | | |
| | | | | | |
| 9 | Program: Rental Assistance Demonstration - Cl | lementina | | TOTAL | |
| 10 | Budget Reference Page No.(s) | | | | |
| 11 | | 7/1/17-6/30/18 | 7/1/18-6/30/19 | 7/1/17-6/30/19 | |
| 12 | Human Services Agency Expenditures | 11 11 11 11 11 11 | | .,,,,,, | |
| 13 | | \$0 | \$0 | \$0 | |
| 14 | | \$263.715 | \$263,715 | \$527,430 | |
| | Capital Expenditure | \$0 | \$0 | \$0 | |
| 16 | Subtotal | \$263,715 | \$263,715 | \$527,430 | |
| 17 | Indirect Percentage (%) | 4% | 4% | 4% | |
| | Indirect Cost (Line 16 X Line 17) | \$10,549 | \$10,549 | \$21,098 | |
| | Total HSA Expenditures | \$274.264 | \$274,264 | \$548,528 | |
| 20 | Developer Match Expenditures | Ψ217,207 | Ψ217,207 | ψ0+0,020 | |
| | Salaries & Benefits | \$0 | \$0 | \$0 | |
| - | | \$155,769 | \$155,769 | \$311,538 | |
| | Operating Expense | \$155,769 | \$155,769 | \$0 \$0 | |
| | Capital Expenditure Subtotal | \$155,769 | \$155,769 | \$311,538 | |
| | Indirect Percentage (%) | | | | |
| | | 4% | 4% | 4% | |
| | 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 | | | | | |
| | TOTAL HOA DEVENUES | * | A | * | |
| 39 | TOTAL HSA REVENUES | \$274,264 | \$274,264 | \$548,528 | |
| 40 | Developer Revenues | _ | <u>.</u> | 4. | |
| 41 | Developer Match Funds | \$162,000 | \$162,000 | \$324,000 | |
| 42 | | | | | |
| 43 | | | | | |
| 44 45 | Total Developer Revenues | \$162,000 | \$162,000 | \$324,000 | |
| _ | Total Developer Nevertues | φ102,000 | φ102,000 | φ32 4 ,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. | | |
| | | i aui oussiliali | тогерноне 140. | | |
| 51 | HSA-CO Review Signature: | | | | |
| 52 | HSA #1 | | | | |
| 53 | | | | | |
| | | | | | |

| | A B C | D | E | F G | н і |
|----------|---|--------|--------------------------|-----------------------|-----------------------|
| 1 | | | | Door | Appendix B-4, Page 2 |
| 3 | | | | Docu | ument Date: 4/13/2017 |
| 4 | Tenderloin Neighborhood Development Corpo | ration | | | |
| 5 | | | | | |
| 7 | | Ope | rating Expense [| Detail | |
| 8 | | ı | | 1 | |
| 9 | | | Human Services Agency | Human Services Agency | TOTAL |
| | HSA Expenditure Category | TERM | | 7/1/18-6/30/19 | 7/1/17-6/30/19 |
| 11 | Rental of Property | _ | | | _ |
| 12 | Telephone | • | | - | |
| 13 | Office Supplies, Postage | • | | | |
| 14 | Maintenance Supplies and Repair | • | | | |
| | Printing and Reproduction | • | | | |
| | Insurance | • | | | - |
| | Staff Travel (local) &Training | • | | - | |
| | Law Library | • | | | |
| | Membership/Dues | • | | | |
| | Rental of Equipment | • | | | |
| | Senior Right Bulletin | | | | - |
| | Sub-Contractor (NCPHS) | • | \$263,715 | \$263,715 | \$527,430 |
| 23 | , , | | | | |
| 24 | | | | | |
| | OTHER | | | | |
| 26 27 | | | | | - |
| 28 | | | | | |
| 29 | | | | | |
| 30 | | | | • | |
| | TOTAL HSA OPERATING EXPENSE | | \$263,715 | \$263,715 | \$527,430 |
| 32 | | | | | |
| | Developer Match Operating Expense | | | | |
| | Rental of Property | | | | |
| | Telephone | | | | |
| | Office Supplies, Postage | | | | |
| | Printing and Reproduction | • | | <u> </u> | |
| | Insurance | | | · | |
| | Law Library | | | <u> </u> | |
| 40 | Membership/Dues | | | | |
| 41 | Rental of Equipment | • | | | |
| 42 | Volunteer Expenses (Receptionist/intake) | ē | | | |
| | Client Costs | | | | |
| | Maintenance Supplies and Repair | | | | |
| 45 | Utilities | | | | |
| 46 | Janitorial service & supplies | • | | | |
| 47 | Sub-Contractor (NCPHS) | | \$155,769 | \$155,769 | \$311,538 |
| 48 | | | | | |
| | TOTAL DEVELOPER OPERATING EXPENSE | | \$155,769 | \$155,769 | \$311,538 |
| 50 51 | TOTAL OPERATING EXPENSE | | \$419,484 | \$419,484 | \$838,968 |
| 52 53 | HSA #3 | • | | | |
| 54 | 11071 #0 | | | | |