



MEMORANDUM

TO: AGING & ADULT SERVICES COMMISSION

THROUGH: SHIREEN McSPADDEN, EXECUTIVE DIRECTOR

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

DATE: MAY 2, 2018

SUBJECT: NEW GRANTS: MULTIPLE GRANTEES (NON-PROFIT) for THE PROVISION OF LIMITED TERM HOUSING SUBSIDIES FOR OLDER ADULTS AND ADULTS WITH DISABILITIES

GRANT TERM(S): 3/1/2018 – 6/30/2019

GRANT AMOUNTS: See table below

Source:	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
Funding:	\$1,500,000			\$150,000	\$1,650,000
Percentage	100%				100%

The Department of Aging and Adult Services (DAAS) requests authorization to enter into new grant agreements with the proposed grantees listed below (page 2) for the provision of limited term housing subsidies for older adults and adults with disabilities in the amount of \$1,500,000 plus a 10% contingency for a total amount not to exceed \$1,650,000. The term of the grants will be from March 1, 2018 to June 30, 2019. The purpose of this grants are to provide the housing subsidy for seniors and adults with disabilities.

Background

The challenge of maintaining safe, affordable housing is ubiquitous in today’s San Francisco. This problem disproportionately affects older adults and adults with disabilities. More than 38% of adults aged 60 years or older live below 200% of the federal poverty level compared to 27% of their younger counterparts. Income and wealth disparities are particularly pronounced among younger adults with disabilities, one third of whom live below 100% of

the federal poverty level. This number provides a stark contrast to only one in ten younger adults without disabilities living below the poverty level.

Services to be Provided

The Housing Subsidy for Seniors Program shall include the following five components: 1) Program Infrastructure to administer the program, 2) Client Identification and Eligibility practices and policies, 3) Housing Subsidy Payments, 4) Housing Subsidy Recertification to ensure that clients continue to meet eligibility requirements, and 5) Case Planning Component to ensure that clients can further stabilize their housing situation through connection with support, legal, social, medical, and other services.

With the addback funding, Self Help for the Elderly will provide housing subsidies to 150 unduplicated consumers in FY 17-18 and FY 18-19 and Q Foundation will provide housing subsidies to 45 unduplicated consumers in FY 17-18 and FY 18-19.

GRANTEE	Fiscal Year (FY) 17-18	Fiscal Year (FY) 18-19 Total Amount	10% Contingency	FY 17-20 Total Not to Exceed Amount
Self-Help for the Elderly	\$375,000	\$750,000	\$112,500	\$1,237,500
Q Foundation dba AIDS Housing Alliance/SF	\$125,000	\$250,000	\$37,500	\$412,500
TOTAL	\$500,000	\$1,000,000	\$150,000	\$1,650,000

Performance

This is a new grant for Self-Help for the Elderly; there is no monitoring history specific for housing subsidies to report at this time. We have a current grant with Q Foundation dba AIDS Housing Alliance/SF for a long term housing subsidies program which was monitored in June 2017 and found in compliance with performance and monitoring requirements.

Grantee Selections

Grantees were selected through RFP #775 issued in November 15, 2017.

Funding

This grant will be funded entirely through City and County General Fund.

Attachments:

Self-Help for the Elderly

Appendix A – Services to be Provided

Appendix B – Budget

Q Foundation dba Aids Housing Alliance/SF

Appendix A – Services to be Provided

Appendix B – Budget

**Appendix A – Services to be Provided
Self-Help for the Elderly
Limited Term Housing Subsidies
March 1, 2018 through June 30, 2019**

I. Purpose of Grant

Seniors and adults with disabilities face an ongoing struggle to maintain stable housing in San Francisco due to increasing rents and a limited supply of safe, affordable housing. These services are intended to prevent homelessness through identifying seniors and adults with disabilities in unstable housing situations and assisting them in stabilizing that housing through the use of limited term housing subsidy payments.

II. Definitions

Adult with Disabilities	Person 18 years of age or older living with a disability
AMI	Area Median Income, for the area containing San Francisco is a figure established by the United States Department of Housing and Urban Development on an annual basis. The City of San Francisco’s Mayor’s Office on Housing (sf-moh.org) publishes an AMI chart each year.
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAAS	Department of Aging and Adult Services
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: Activities of Daily Living (ADL), and Instrumental Activities of Daily Living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment.
Grantee	Self-Help for the Elderly
HSA	Human Services Agency of the City and County of San Francisco
LGBT	Lesbian, Gay, Bisexual, Transgender
Low Income	Income at or below 300% of the federal poverty line defined by the Federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services, currently at \$36,320 for an individual.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c)

	Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130
OCM	Office of Contract Management, Human Services Agency
OOA	Office on the Aging
Frail	An older individual is determined to be functionally impaired because the individual either: (a) Is unable to perform at least two activities of daily living, including bathing, toileting, dressing, feeding, breathing, transferring and mobility and associated tasks, without substantial human assistance, including verbal reminding, physical cueing or supervision. (b) Due to a cognitive or other mental impairment, requires substantial supervision because the older individual behaves in a manner that poses a serious health or safety hazard to the individual or to others.
Senior	Person who is 60 years of age or older; used interchangeably with the “Older Adult”
SOGI Data Collection	Sexual Orientation and Gender Identity Data Collection, is a result of Ordinance No. 159-16 which amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9.)

III. Target Population

Individuals 60 years of age or older or individuals between 18 and 59 years of age that are living with disabilities. Services must target clients who are members of one or more of the following groups that have been identified as demonstrating the greatest economic and social need:

- Low Income
- Non or limited – English speaking
- Minority
- Frail
- Lesbian, Gay, Bisexual, Transgender

IV. Eligibility for Services

To obtain housing subsidies under this program, an individual must meet the following criteria:

- 1) A resident of San Francisco
- 2) Aged 60 and above, or
- 3) Aged 18 to 59 with a disability
- 4) Income at or below 40% of AMI
- 5) Lacking stable housing or at risk for homelessness

- 6) Not currently receiving duplicative housing subsidy services
- 7) Has a need for housing subsidy and is willing to participate in the program

V. Description of Services

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

Program Infrastructure

- Administrative assistance, data entry, database maintenance, processing of invoices, and payments to landlords.
- Purchase of service contracts and payment policies.
- Program policies and procedures which include all accounting procedures and reporting functions needed to administer housing subsidy program.
- A dedicated database to capture care planning, case management, client information tracking, purchased services and dollars spent for clients on housing subsidies.

Client Identification and Eligibility

- Policies and procedures clearly defining eligibility criteria, application, decision and award processes, recertification process, etc.
- Policies and procedures for waitlists and other program functions.

Housing Subsidy Payments

- Rent subsidies shall average \$800 per household, per month. The subsidy should be set at the lowest possible amount needed to stably maintain the household.
- Rent limits should conform to Housing and Urban Development Fair Market Rents for San Francisco Housing and Urban Development Metro Area.
- The rent subsidy amount will be determined by each household's income to rent ratio. Thus, the monthly lease agreement the household has entered into will be calculated against each household's monthly income. The goal will be to use the rental subsidy to bring the household income to rent ratio to 30%.
- A limited number of subsidies above \$800 may be issued in exceptional and/or urgent temporary situations, for a maximum of 6 months, and for a maximum subsidy amount of 100% of the rent.
- For those receiving a subsidy above \$800 clear documentation of their eligibility and needs for the increased subsidy should be available, as well as a plan to reduce the subsidy within 6 months.
- Grantee must clearly demonstrate linkages to existing resources for income and other resources.
- Grantee will work to ensure sub-standard housing issues are addressed. When evaluating potential housing, units with serious code violations

must be excluded. At a minimum, an apartment inspection checklist will be utilized to ensure that units meet minimum safety guidelines.

- Housing subsidy payments will go directly to the landlord.

Housing Subsidy Recertification:

- The subsidy must be recertified every 6 months at minimum, 2 months for subsidies higher than \$800, and more frequently if there are concerns about the household's non-compliance, lack of progress, or if sub-standard housing or safety issues are present.

Case Planning Component

- Program staff will help the client complete an intake form, gather all information needed to complete the assessment, including income, assets, and housing situation and risk of housing instability, loss or eviction.
- Program staff will be familiar with other community organizations and assist clients in connecting with other organizations as needed.
- Self-Help staff will work collaboratively with other community organizations presently working with the client and additional ones who can provide specific expertise.
- Entrance into and maintenance of a case plan or contract will be mandatory and clients must show good faith, verifiable efforts in making progress toward short and long-term goals. These goals include but are not limited to:
 - Actions to increase income and access to other available resources which help lower overall household expenses.
 - Actions to improve credit history and rental stability.
 - Efforts to address behavioral health issues that negatively impact housing stability
 - Efforts to access more affordable housing, including applying to appropriate wait lists

Program Sunset

- Self-Help for the Elderly Housing Subsidies Program is designed to end as of June 30, 2019.
- The program will have policies and procedures for transitioning clients from the program as of the sunset date.
- New clients will be informed of the short term nature of their subsidy.
- Written notification will be sent to clients prior to program closing.
- During the last six (6) months of the program, the Housing Subsidies Program team will contact and work with individual clients as needed to reassess their overall service needs for promoting stabilized housing, implement referrals to other resources, and support their transition to other available services supporting their needs.

IV. Location and Time of Services

Operations will be based at Self-Help for the Elderly's offices, 601 Jackson Street, San Francisco, CA, from 8:30am - 5:15pm, Monday through Friday. The office facilities are fully accessible to seniors and adults with physical disabilities.

V. Service Objectives

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

- FY17/18: Provide rental subsidy for at least 96 unduplicated consumers (heads of household).
FY18/19: Provide rental subsidy for at least 54 unduplicated consumers (heads of household).
- FY17/18: Provide 273 months of housing subsidies. A unit of service is one monthly subsidy payment .
FY18/19: Provide 627 months of housing subsidies. A unit of service is one monthly subsidy payment.

VI. Outcome Objectives

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

Housing Retention Outcomes

- 85% of clients will remain stably housed 6 months after assistance begins.
- 50% of clients will remain stably housed 6 months after assistance ends.

Client Satisfaction Outcomes

- At least 75% of participants indicate on the Consumer Satisfaction Survey that they receive the peripheral services, referrals, and other support they need from the agency.
- At least 75% of consumers who receive housing subsidy report on the Consumer Satisfaction Survey that the subsidy assisted them in being housed stably.

VII. Reporting Requirements

- A. Grantee will enter into CA GetCare required consumer information using a DAAS provided or approved intake form in a timely manner.
- B. Grantee will enter into the CA GetCare Service Units section all units of service by the 5th working day of the month for the preceding month.
- C. Grantee will provide a monthly report of number of service units in each of the categories of service as described in Section II of this appendix.
- D. Grantee will provide a monthly report of activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.

- E. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as requested by HSA.
- F. Grantee will provide an annual consumer satisfaction survey report to OOA by March 15 each grant year. At least 75% of program participants will complete and return satisfaction surveys.
- G. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules.
- H. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee.
- I. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
- J. Grantee will provide Ad Hoc reports as required by the Department.
- K. Quarterly and Annual Reports will be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system.

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

Tahir.Shaikh@sfgov.org
 Contract Manager, Office of Contract Management

or

Rick.Appleby@sfgov.org
 Program Analyst, Office on Aging, Department of Aging and Adult Services

VIII. Monitoring Activities

A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA-GetCare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; program operation, which includes a review of a written policies and procedures manual of all OOA funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; board of director list; and whether services are provided appropriately according to Sections IV, VI, and VII.

B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly

balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D	E
1					Appendix B, Page 1
2					Document Date: February 20, 2018
3	HUMAN SERVICES AGENCY BUDGET SUMMARY				
4	BY PROGRAM				
5	Name			Term 16 months	
6	Self-Help for the Elderly				
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
8	If modification, Effective Date of Mod.		No. of Mod.		
9	Program: Housing Subsidies for Seniors & AWD				
10	Budget Reference Page No.(s)				Total
11	Program Term		3/1/18-6/30/18	7/1/18-6/30/19	3/1/18-6/30/19
12	Expenditures				
13	Salaries & Benefits	\$55,681	\$161,773		\$217,454
14	Operating Expense(Does not include subsidy amount)	\$8,680	\$16,660		\$25,340
15	Subtotal	\$64,361	\$178,433		\$242,794
16	Indirect Percentage (%)	13%	13%		\$0
17	Indirect Cost (Line 16 X Line 15)	\$8,367	\$23,196		\$31,563
18	Capital Expenditure	\$1,800	\$0		\$1,800
19	Subsidy Amount	\$300,472	\$548,371		\$848,843
20	Total Expenditures	\$375,000	\$750,000		\$1,125,000
21	HSA Revenues				
22	General Fund	\$375,000	\$750,000		\$1,125,000
23					
24					
25					
26					
27					
28					
29					
30	TOTAL HSA REVENUES	\$375,000	\$750,000		\$1,125,000
31	Other Revenues				
32					
33	Match-In-Kind	\$ 18,000	\$ 36,000		\$54,000
34					
35					
36					
37	Total Revenues	\$393,000	\$786,000		\$1,179,000
38	Full Time Equivalent (FTE)	2.85	2.85		
40	Prepared by: Leny Nair	Telephone No.: 415-677-7682		Date 2/20/18	
41	HSA-CO Review Signature:	_____			
42	HSA #1	11/15/2007			

Program Name: **Housing Subsidies to Seniors and AWD**
 (Same as Line 9 on HSA #1)

Salaries & Benefits Detail

11	12	Agency Totals		For HSA Program		3/1/18-6/30/18		7/1/18-6/30/19		3/1/18-6/30/19	
		Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	TOTAL
13	Housing Program Coordinator	\$45,760	100%	100%	100%	\$15,253	\$45,760				\$61,013
14	Director of Social Services	\$83,000	100%	100%	10%	\$4,150	\$8,300				\$12,450
15	Program Assistant	\$39,520	100%	75%	75%	\$9,880	\$29,640				\$39,520
16	Subsidy Accountant	\$43,680	100%	100%	100%	\$14,560	\$43,680				\$58,240
17											
18											
19											
20											
21											
22											
23											
24											
25											
26											
27											
28											
29											
30	TOTALS	\$211,960	4.00	3.75	2.85	\$43,843	\$127,380		\$0		\$171,223
31											
32	FRINGE BENEFIT RATE	27%									
33	EMPLOYEE FRINGE BENEFITS	\$57,229				\$11,838	\$34,393		\$0		\$46,231
34											
35											
36	TOTAL SALARIES & BENEFITS	\$269,189				\$55,681	\$161,773		\$0		\$217,454
37	HSA #2	11/15/2007									

	A	B	C	D	E	F
1						Appendix B, Page 4
2						Document Date: 2/20/2018
3						
4	Program Name:					
5	(Same as Line 9 on HSA #1)					
6						
7						
8						
9						
10	EQUIPMENT	TERM	3/1/18-6/30/19			TOTAL
						3/1/18-6/30/19
11	No.	ITEM/DESCRIPTION				
12	1	Laptop for the Housing Program Subsidy use	1,000			1,000
13	1	Desktop for the Program Assistant	\$800			800
14						0
15						0
16						0
17						0
18						0
19						0
20	TOTAL EQUIPMENT COST		1,800	0	0	1,800
21						
22	REMODELING					
23	Description:					0
24						0
25						0
26						0
27						0
28						0
29	TOTAL REMODELING COST		0	0	0	0
30						
31	TOTAL CAPITAL EXPENDITURE		1,800	0	0	1,800
32	(Equipment and Remodeling Cost)					
33	HSA #4					11/15/2007

Appendix A – Services to be Provided
Q Foundation
Limited Term Housing Subsidies
March 1, 2018 to June 30, 2019

I. Purpose of Grant

Seniors and adults with disabilities face an ongoing struggle to maintain stable housing in San Francisco due to increasing rents and a limited supply of safe, affordable housing. These services are intended to prevent homelessness through identifying seniors and adults with disabilities in unstable housing situations and assisting them in stabilizing that housing through the use of limited term housing subsidy payments.

II. Definitions

Adult with Disabilities	Person 18 years of age or older living with a disability
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Grantee	Q Foundation dba AIDS Housing Alliance
HSA	Human Services Agency of the City and County of San Francisco
LGBT	Lesbian, Gay, Bisexual, Transgender
Low Income	Income at or below 300% of the federal poverty line defined by the Federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services, currently at \$36,320 for an individual.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish

	or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130
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III. Target Population

Individuals 60 years of age or older or individuals between 18 and 59 years of age that are living with disabilities. Services must target clients who are members of one or more of the following groups that have been identified as demonstrating the greatest economic and social need:

- Low Income
- Non or limited – English speaking
- Minority
- Frail
- Lesbian, Gay, Bisexual, Transgender

Eligibility for Services: To obtain housing subsidies under this program, an individual must meet the following criteria:

- 1) A resident of San Francisco
- 2) Aged 60 and above, or
- 3) Aged 18 to 59 with a disability
- 4) Income at or below 40% of AMI

- 5) Lacking stable housing or at risk for homelessness
- 6) Not currently receiving duplicative housing subsidy services
- 7) Has a need for housing subsidy and is willing to participate in the program

IV. Description of Services

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

Program Infrastructure

- Administrative assistance, data entry, database maintenance, processing of invoices and payments to landlords.
- Purchase of service contracts and payment policies.
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Housing Subsidy Recertification:

- The subsidy must be recertified every 6 months at minimum, 2 months for subsidies higher than \$800, and more frequently if there are concerns about the household's non-compliance, lack of progress, or if sub-standard housing or safety issues are present.

Case Planning Component:

- Program staff will help the client complete an intake form, gather all information needed to complete the assessment, including income, assets, and housing situation and risk of housing instability, loss or eviction.
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 - Actions to improve credit history and rental stability.
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Program Sunset

- Q Foundation Housing Subsidies Program is designed to end as of June 30, 2019.
- The program will have established policies and procedures for transitioning clients from the program as of the sunset date.
- New clients will be informed of the short term nature of their subsidy.
- Written notification will be sent to clients prior to program closing.
- During the last six (6) months of the program, the Housing Subsidies Program team will contact and work with individual clients as needed to reassess their overall service needs for promoting stabilized housing, implement referrals to other resources, and support their transition to other available services supporting their needs.

V. Location and Time of Services

Services are delivered at Q Foundation offices, 350 Golden Gate Ave., Suite A, San Francisco, CA 94102. Business hours are Monday - Friday, 9am - 6pm. The office facilities are fully accessible to seniors and adults with physical disabilities.

VI. Service Objectives

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

- FY17/18: Provide housing subsidies for 25 unduplicated consumers
FY18/19: Provide rental subsidies for 20 unduplicated consumers

- FY17/18: Provide 100 months of housing subsidies. A unit of service is one monthly subsidy payment.
FY18/19: Provide 240 months of housing subsidies. A unit of service is one monthly subsidy payment.

VII. Outcome Objectives

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

Housing Retention Outcomes

- 85% of clients will remain stably housed 6 months after assistance begins.
- 50% of clients will remain stably housed 6 months after assistance ends.

Client Satisfaction Outcomes

- At least 75% of participants indicate on the Consumer Satisfaction Survey that they receive the peripheral services, referrals, and other support they need from the agency.
- At least 75% of consumers who receive housing subsidy report on the Consumer Satisfaction Survey that the subsidy assisted them in being housed stably.

VIII. Reporting Requirements

- A. Grantee will enter into CA GetCare required consumer information using a DAAS provided or approved intake form in a timely manner.
- B. Grantee will enter into the CA GetCare Service Units section all units of service by the 5th working day of the month for the preceding month.
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- F. Grantee will provide an annual consumer satisfaction survey report to OOA by March 15 each grant year. At least 75% of program participants will complete and return satisfaction surveys.
- G. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules.
- H. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee.
- I. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
- J. Grantee will provide Ad Hoc reports as required by the Department.
- K. Quarterly and Annual Reports will be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system.

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

Tahir.Shaikh@sfgov.org
 Contract Manager, Office of Contract Management

or

Rick.Appleby@sfgov.org
 Program Analyst, Office on Aging, Department of Aging and Adult Services

IX. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA-GetCare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; program operation, which includes a review of a written policies and procedures manual of all OOA funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; board of director list; and whether services are provided appropriately according to Sections IV, VI, and VII.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting

documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	E
1	Appendix B, Page 1			
2	Document Date: 2/20/2018			
3	HUMAN SERVICES AGENCY BUDGET SUMMARY			
4	BY PROGRAM			
5	Q Foundation	03/01/18 to 06/30/19		
6				
7	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification <input type="checkbox"/>			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	Program: Housing Subsidies for Seniors and Adults With Disabilities 775			
10	Budget Reference Page No.(s)			
11	Program Term	3/1/18 - 6/30/18	7/1/18 - 6/30/19	Total
12	Expenditures			
13	Salaries & Benefits	\$16,027	\$43,531	\$59,558
14	Operating Expense (does not include subs	\$4,012	\$12,036	\$16,048
15	Subtotal	\$20,039	\$55,567	\$75,606
16	Indirect Percentage (%)	14%	13%	14%
17	Indirect Cost (Line 16 X Line 15)	\$2,806	\$7,433	\$10,239
18	Capital Expenditure	\$1,155	\$0	\$1,155
19	Subsidy Amount	\$101,000	\$187,000	\$288,000
20	Total Expenditures	\$125,000	\$250,000	\$375,000
21	HSA Revenues			
22	General Fund	\$125,000	\$250,000	\$375,000
23				
24				
25				
26				
27				
28				
29				
30	TOTAL HSA REVENUES	\$125,000	\$250,000	\$375,000
31	Other Revenues			
32				
33	Q Fundraising	(\$0)	\$0	\$0
34				
35				
36				
37	Total Revenues	\$125,000	\$250,000	\$375,000
38	Full Time Equivalent (FTE)	0.68	0.68	
40	Prepared by: Brian Basinger	Telephone No.: 41: Date: 12/30/2017		
41	HSA-CO Review Signature:	_____		
42	HSA #1	11/15/2007		

	A	B	C	D	E	F	G	I
1	Appendix B, Page 2							
2	Document Date: 12/30/2017							
3								
4	Program Name: Housing Subsidies for Seniors and Adults With Disabilities 775							
5	(Same as Line 9 on HSA #1)							
6								
7	Salaries & Benefits Detail							
8								
9								
10								
11								
		Agency Totals		For HSA Program		3/1/18 - 6/30/18	7/1/18 - 6/30/19	3/1/18-6/30/19
		Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	For DHS Program Budgeted Salary	For DHS Program Budgeted Salary	TOTAL
12	POSITION TITLE							
13	Program Manager	\$110,000	70%	8%	6%	\$2,353	\$7,060	\$9,413
14	Flexible Subsidy Program Manager	\$55,000	100%	10%	10%	\$1,745	\$5,234	\$6,979
15	Flexible Subsidy Program Coordinator	\$55,000	100%	10%	10%	\$1,681	\$5,043	\$6,724
16	Housing Program Manager	\$62,000	100%	10%	10%	\$1,681	\$5,042	\$6,723
18	Housing & Health Navigator I	\$45,000	100%	9%	9%	\$1,375	\$4,126	\$5,501
19	Housing & Health Navigator I	\$45,000	100%	10%	10%	\$1,428	\$4,283	\$5,711
20	Intake Worker	\$31,200	100%	10%	10%	\$594	\$1,782	\$2,376
21	Program Administrator	\$71,406	60%	10%	6%	\$1,135	\$0	\$1,135
22								
23								
24								
25								
26								
27								
28								
29	TOTALS	\$474,606	7.30	0.74	0.68	\$11,991	\$32,570	\$44,561
30								
31	FRINGE BENEFIT RATE	33.65%						
32	EMPLOYEE FRINGE BENEFITS	\$159,728				\$4,036	\$10,961	\$14,997
33								
34								
35	TOTAL SALARIES & BENEFITS	\$634,334				\$16,027	\$43,531	\$59,558
36	HSA #2							11/15/2007

	A	B	C	D	F
1	Appendix B, Page 4				
2	Document Date: 12/30/2017				
3					
4	Program Name: Housing Subsidies for Seniors and Adults With Disabilities 775				
5	(Same as Line 9 on HSA #1)				
6					
7	Program Expenditure Detail				
8					
9	TOTAL				
10	EQUIPMENT	TERM	3/1/18 - 6/30/18	7/1/18 - 6/30/19	3/1/18-6/30/19
11	No.	ITEM/DESCRIPTION			
12	1	Computers and peripherals	\$1,155	\$0	\$1,155
13	1	Furnishings - Chairs			
14	1	VOIP Phones			
15					
16					
17					
18					
19					
20	TOTAL EQUIPMENT COST		\$1,155	\$0	\$1,155
21					
22	R E M O D E L I N G				
23	Description:				
24	Tenant Improvements: floors, bathrooms				
25					
26					
27					
28					
29	TOTAL REMODELING COST				
30					
31	TOTAL CAPITAL EXPENDITURE		\$1,155	\$0	\$1,155
32	(Equipment and Remodeling Cost)				
33	HSA #4				11/15/2007