



**SAN FRANCISCO
HUMAN SERVICES AGENCY**

Department of Benefits
and Family Support

Department of Disability
and Aging Services

Office of Early Care
and Education

P.O. Box 7988
San Francisco, CA
94120-7988
www.SFHSA.org

MEMORANDUM

TO: HUMAN SERVICES COMMISSION

THROUGH: TRENT RHORER, EXECUTIVE DIRECTOR

FROM: NOELLE SIMMONS, DEPUTY DIRECTOR
ESPERANZA ZAPIEN, ACTING DIRECTOR OF CONTRACTS

DATE: DECEMBER 17, 2020

SUBJECT: NEW GRANT: **MULTIPLE PROVIDERS** (see table below) FOR PROVISION OF CALWORKS HOUSING LOCATOR, HOUSING CONNECTOR, AND CASE MANAGEMENT SERVICES

DS
EE

GRANT TERM: 1/01/2021 – 6/30/2022

GRANT AMOUNTS See Table Below

<u>Funding Source</u>	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
FUNDING:	\$1,097,026	\$3,091,619	\$5,784,320	\$997,297	\$10,970,262
PERCENTAGE:	11%	31%	58%		100%



London Breed
Mayor

Trent Rhorer
Executive Director

The Department of Benefits and Family Support requests authorization to enter into new grants with the agencies below for the period of January 1, 2020 to June 30, 2022 in an amount of \$9,972,965 plus a 10% contingency for a total amount not to exceed \$10,970,262. The purpose of this grant is to provide CalWORKs families meeting the California Department of Social Services (CDSS) definition of homelessness, with housing locator, housing connector, and housing stabilization and case management services to obtain and retain permanent housing.

<u>GRANTEE</u>	<u>1/1/21- 6/30/21</u>	<u>7/1/21- 6/30/22</u>	<u>Total Grant Amount</u>	<u>Contingency</u>	<u>Total Not To Exceed</u>
Abode Services	\$883,834	\$2,368,762	\$3,252,596	\$325,260	\$3,577,856
Catholic Charities	\$586,472	\$1,245,797	\$1,832,269	\$183,227	\$2,015,496
Hamilton Families	\$1,744,667	\$3,143,433	\$4,888,100	\$488,810	\$5,376,910
TOTAL	\$3,214,973	\$6,757,992	\$9,972,965	\$997,297	\$10,970,262

Background

Homelessness has been identified as one of the major barriers that impact the CalWORKs families' ability to participate in required activities and meet program requirements that leads toward the path of self-sufficiency. Senate Bill (SB) 855 (Chapter 29, Statutes of 2014) allocated State funding for housing supports to homeless CalWORKs recipients. Since 2013, 554 CalWORKs families have been placed in permanent housing through the CalWORKs Housing Support Program to-date. Contractors provide placement of new families into permanent housing and also provide the ongoing case management, managing the rental subsidies and supportive services.

An RFP was issued in January 2020 and HSA awarded to Abode, Catholic Charities, and Hamilton Families. With three providers, HSA will expand the number of families supported through the Housing Support Program, include employment services to support families, and leverage the providers' resources in counties outside SF where families may be placed.

Services to be Provided

All three Grantees will provide CalWORKs families living in shelters, in transitional housing programs, and families who are at risk of losing their permanent housing, with housing locator and housing connector services to obtain and retain permanent housing.

Housing Locator Services

Identifies units and provides unit descriptions for the housing match and placement process. Grantee will identify and establish a current list of available housing units for this program within the City and County of San Francisco and surrounding Bay Area Counties (within the Bay Area's nine counties and beyond).

Housing Connector Services

Works with Housing Locator Services, the CalWORKs Social Worker, and CalWORKs families to match and place the families with available housing units and assists families throughout the lease application and placement process.

Housing Stabilization and Case Management Services

Provides ongoing intensive housing case management services including regular meetings with participants to track progress towards employment and housing goals, and referrals to other local supportive services. In addition to these services, the modification will support expanded case management services for all program clients as well as direct pass-through subsidies to clients for various housing-related costs, such as move-in assistance, rental subsidies for up to one year, and household goods.

Employment Services for HSP Participants

In addition to Housing Services, Hamilton Families and Catholic Charities will provide robust employment services that go beyond referrals to employment and training services. It will include job readiness, job search, and job placement services. Services shall be provided to HSP participants residing in the designated counties, whether or not Grantee provides Housing Stability Case Management to the family.

This grant will provide for placement of 103 families into housing for the second half of FY21 and 156 families for FY22 while continuing to provide housing support including landlord mediation, as needed, for those already housed.

Selection

Grantees were selected through Request for Proposals #857, which was competitively bid in January 2020.

Funding

Funding for this grant is provided by a combination of Federal, State, and Local funds.

ATTACHMENTS

Abode Services Appendix A – Services to be Provided

Abode Services Appendix B – Budget

Catholic Charities Appendix A – Services to be Provided

Catholic Charities Appendix B – Budget

Hamilton Families Appendix A – Services to be Provided

Hamilton Families Appendix B – Budget

APPENDIX A – Services to be Provided
Abode Services
CalWORKs Housing Locator, Housing Connector, and Housing Stabilization
January 1, 2021 – June 30, 2022

I. Purpose of Grant

To provide CalWORKs families meeting the California Department of Social Services (CDSS) definition of homelessness, with housing locator, housing connector, and housing stabilization and case management services to obtain and retain permanent housing.

II. Definitions

CalWORKs or CW	California Work Opportunity and Responsibility to Kids welfare-to-work program for families receiving Temporary Aid to Needy Families (TANF) cash aid.
CARBON	Contracts Administration, Reporting and Billing Online database
CES	Coordinated Entry System, a local or regional system for homeless families to be assessed, triaged and referred to housing and homeless services.
CWHSP	CalWORKs Housing Support Program, an integrated program of HSA staff and contracted services to place Homeless CalWORKs participants in permanent housing.
Grantee	Abode Services
Homeless	CDSS definition of homeless under the Housing Support Program, currently: <ol style="list-style-type: none"> 1) Lacking a fixed and regular nighttime residence; or 2) Having a primary nighttime residence that is a supervised publicly or privately operated shelter designed to provide temporary living accommodations; or 3) Residing in a public or private place not designed for, or ordinarily used as, a regular sleeping accommodation for human beings; or 4) In receipt of a judgment for eviction, as ordered by a court.
HSA	Human Services Agency of the City and County of San Francisco, also the Department
Launchpad	Web-based client tracking system used by HSA and all of its contracted service providers.

SOGI	Sexual Orientation and Gender Identity. A City ordinance requiring grantees to collect data concerning SOGI information on clients they serve.
SW	Human Service Agency Social Worker staff
WtW	Welfare-to-Work

III. Target Population

CalWORKs families, as referred by HSA staff, meeting the definition of Homelessness developed for this program by the California Department of Social Services as listed in Section II Definitions.

IV. Description of Services

Housing Locator Services

- A. Provide a list of units with descriptions for every housing match and placement process. Contractor will identify and establish a current list of available housing units for this program within the City and County of San Francisco and surrounding Bay Area Counties including but not limited to: Alameda, Contra Costa, Marin, Napa, San Mateo, Santa Clara, and Solano.
- B. Utilize a systematic approach to searching for suitable units, using standard real estate networking listings and publications, landlord outreach, and other methods. This should result in a portfolio of units that vary in size reflective of the CalWORKs families' needs, and that have monthly rent amounts that a family could conceivably assume without the help of a subsidy after exiting the Housing Support Program.
- C. Target housing search to neighborhoods where families have a higher likelihood of economic success, housing stability and overall well-being. Examples of criteria that can be used to determine likelihood of success include easy access to public transportation, access to high performing public schools, access to community-based supportive services and low rates of community violence.
- D. Maintaining a centralized, virtually accessible, listing of units with description and information on how to apply, within SF and beyond throughout the nine Bay Area surrounding counties, as appropriate, that is updated weekly and could be accessible to CalWORKs staff and assigned participants in the Housing Support Program.
- E. Provide post-placement landlord services as needed. After the housing placement and follow-up and retention service period, the Housing Services Locator is expected to become involved again with the families if there are problems with ongoing housing retention that may include arbitrating conflicts with the landlord. This service must be provided to all HSP families, regardless of whether case management is provided by SFHSA or by the contracted provider.
- F. Communicate frequently with the CalWORKs program and Housing Connector through emails, phone calls, and possibly web-based resources to disseminate information about housing resources, coordinate the matching of families to housing options, and navigate placement and retention in housing.

- G. Provide language capacity for service mirroring the needs of the CalWORKs population.

Housing Connector Services

- A. Operate in accordance with the Housing First philosophy and Rapid Rehousing model.
- B. Work with Housing Locator, the CalWORKs SW, and CalWORKs families to match and place the families with available housing units, and assist families throughout the lease application and placement process. NOTE: The referral process of families from CW SW to Grantee is done via Launchpad, and office space for Grantee could be made available at the CalWORKs site to improve coordination and streamline this process.
- C. Families referred by HSA will move to Housing Connector Services within 7 days from the date referred to Grantee by the CW HSP unit. At a minimum, families should be contacted and scheduled for intake.
- D. Transport families and show available units to determine a match.
- E. In collaboration with the CalWORKs SW and CalWORKs families, perform the appropriate housing matches between units and identified families, recommend housing options/solutions, and placement that includes making housing-related service referrals that lead to lease approval.
- F. Coordinate housing search process and provide responsive and collaborative effort focusing on the intensive beginning phase to match/place CalWORKs families with housing. This includes completing the housing application and assistance on obtaining required documentation to get the lease completed, providing a unit move-in to-do list to the families, and completing the move-in checklist requirements for CalWORKs program documentation.
- G. Families will be placed in permanent housing in an average of 30 days from the start of their housing search.
- H. Negotiate leases with landlords pertaining to families to be placed in their rental properties. Note: the lease needs to be a year in length and signed prior to move-in and sent to the CWHSP on a weekly basis.
- I. Conduct and document a pre-move-in inspection report of units considered for match and placement process to ensure basic habitability, safety and cleanliness. Note: this report should include documentation and photos to identify any pending repairs to be provided to CalWORKs SW prior to the move-in date.
- J. Work with the CalWORKs SW to identify, gather and coordinate families' eligible expenses and to issue expenditures for move-in such as the deposit, first and last month's rent, furniture, etc. Assist families in applying for move-in assistance from other sources on expenses that are not covered, as appropriate.
- K. Directly pay for approved housing search (including credit checks, application fees, paying off debt to utility companies, assistance in correcting erroneous unlawful detainers) and move-in costs (security deposit, first, second, and last month's rent, furniture), and other costs related to these program participant activities that are approved by CalWORKs per CWHSP guidelines.
- L. Educate families about their lease or occupancy agreement.
- M. Serve as the direct landlord liaison and communicate with the CalWORKs SW.
- N. Provide weekly progress report to the CalWORKs SW on the status of families in the matching and placement process.

- O. Track leased units in a database, noting occupancy dates and lease terms, any changes in ownership or property management. Share that information with HSA on a monthly basis for the ongoing subsidy payments.
- P. Communicate frequently with the CalWORKs program and Housing Stabilization provider through emails, phone calls, and possibly web-based resources to disseminate information about housing resources, coordinate the matching of families to housing options, and navigate placement and retention in housing.
- Q. Provide Neighborhood Welcome packets including information on local community services and resources and distribute the packet to families once placed.
- R. Provide language capacity for service mirroring the needs of the CalWORKs population.

Housing Stabilization and Case Management Services

- A. Provide wrap-around ongoing and dynamic housing case management until the family exits the CalWORKs Housing Support Program. Case management services to include:
 - 1. Develop a housing case management plan upon assuming case management. Plan should incorporate goals that support the family's near-term housing retention and stability and that support the family's ability to eventually move off of the subsidy while maintaining housing stability.
 - 2. At least monthly face-to-face meetings, or as otherwise appropriate during the COVID-19 public health emergency, with the family and its head of household upon assuming case management or following housing placement. Case management approach with the family needs to be assertive, responsive, supportive and collaborative that adjusts depending on the family's situation. Other meetings in addition to the monthly face-to-face could either be in-office, via phone/web, or home visits depending upon the need.
 - 3. Provide participants with an up-to-date resource list with local social services and employment services providers when families are placed to actively support linkages to needed services in the new community and facilitate connection with local employment opportunities. Make warm referrals to community-based services whenever possible.
 - 4. Actively monitor and support program participant's progress toward obtaining or maintaining employment and increasing income, where appropriate. This includes connecting all families who are ready to engage in employment or job readiness services with HSA's JobsNOW program, provided that they are housed within commuting range of San Francisco, and establishing referral relationships with employment services providers in the community of residence.
 - 5. Actively monitor and support program participant's housing retention and stability. Update the housing case management plan quarterly that includes housing goals with each family with a plan for when the subsidy ends.
 - 6. On an as needed basis, case management may entail coordinating with CWHSP and San Francisco's CES to connect HSP program participants with deeper housing needs to the broader array of housing and homeless services available, including emergency shelter and permanent supportive housing.
- B. Provide follow-up housing placement and retention services to all placed CalWORKs families until exit from the program.

- C. Connect participants with local tenancy and eviction prevention services, when appropriate.
- D. Connect with local resources, agencies and supportive services. Provide Information and Referral to permanent housing resources including but not limited to public housing and Section 8. For families who fall out of HSP housing placement, every attempt will be made to link the family to the local CES.
- E. While receiving housing case management services, the Housing Services Locator may need to be involved again with the families if there are problems with ongoing housing retention that may include arbitrating conflicts with the landlord. This applies to all HSP families, regardless of whether case management is provided by SFHSA or by the contracted provider.
- F. Administer the rental subsidy for designated program participants and follow CWHSP program guidelines that include increasing the share of his or her monthly income towards the rent for families case managed by Grantee.
- G. Receive and maintain family CalWORKs eligibility documents from program participants on a monthly basis. Income reported to Case Manager must be verified.
- H. Verify program participants' ongoing CalWORKs eligibility monthly and notify CW SW if discontinued. Determine if program participant will continue receiving retention services under CW WtW and for how long. Per state regulations, families no longer active in CalWORKs or not receiving retention services will become ineligible for HSP.
- I. When applicable, verify CW WtW program participants' discontinuance letter in counties outside of San Francisco to determine if they are eligible for additional 12 months under San Francisco's WtW retention rules.
- J. Provide language capacity for service mirroring the needs of the CalWORKs population.

Employment Services

Grantee shall connect families with other HSP contractors to provide employment services based on their county of residence. This connection is to include providing a space at Abode Services's regional site for families to meet and access employment services as appropriate.

HSA Responsibilities

- A. CalWORKs SW will work closely together with Grantee staff on matching and housing placement. All program participants will have access to a full array of wrap-around services through their CalWORKs Housing SW. When an HSP program participant is re-housed outside of San Francisco, the CalWORKs SW will ensure a "warm handoff" to the CalWORKs program in the new county of residence.
- B. Provide office/desk space to Grantee staff while working at HSA site to better coordinate with CalWORKs staff.
- C. Provide Grantee with a direct linkage to JobsNOW for referral and to be abreast of program offerings.
- D. Develop a memorandum of understanding that outlines the coordination agreement and expectations on employment services for Grantee and the other HSP contractors.

V. Location and Time of Services

Grantee shall provide contracted services in San Francisco, other Abode Services locations, and at housing sites. Grantee staff will also work at CalWORKs offices as described above. Services are to be provided five days a week, between the hours of 9:00am and 5:00pm, some evenings and weekends, and at other times when necessary to best serve the needs of families. The nature of the Housing Locator and Housing Connector work will require extensive work in the community, including the surrounding counties.

VI. Service Objectives

The Grantee will meet the following Service Objectives:

- A. Provide Housing Locator and Housing Connector services to all referred CalWORKs families per year. Number of referrals made each year will be based on the agreed upon number of families to be placed in housing within the program year.
- B. Place 40 new families in housing in FY20-21 (January through June 2021) and 60 new families in FY21-22.
- C. Provide ongoing case management and direct rent subsidy payments to referred CalWORKs families. In FY20-21, Grantee will serve 40 families at any given time. In FY20-22, Grantee will serve 80 families at any given time.

VII. Outcome Objectives

The Grantee will meet the following Outcome Objectives:

- A. 95% of families will remain stably housed 3 months after being placed.
- B. 85% of families placed who receive case management services from Grantee will retain housing 9 months after housing placement.
- C. 50% of families placed who receive case management services will successfully exit the subsidy to stable housing 15 months after housing placement.
- D. 80% of families in HSP who receive case management services from Grantee that exit the program will exit to permanent housing.
- E. 85% of families exiting HSP who receive case management services from Grantee should not become homeless within a year.
- F. A minimum of 50% of HSP families served during a survey sample period shall complete a Client Satisfaction Survey. 80% of participants participating in the Client Satisfaction Survey will rate services as “Excellent” or “Good”. Grantee should include the following standardized questions: “How would you rate the [specific services] Program overall?”, “How would you rate staff responsiveness and follow-through with issues?”, “How would you rate staff effectiveness in connecting you to services in your new county of residence?” The options should be “Excellent”, “Good”, “Fair” and “Poor”. This survey will be conducted by Grantee according to HSA guidelines.
- G. CalWORKs staff involved in HSP shall complete a Client Satisfaction Survey. 80% of CalWORKs staff taking the Client Satisfaction Survey will rate services as “Excellent” or “Good”. Grantee should use the following standardized question: “How would you rate the [specific services] Program overall?” The options should be “Excellent”, “Good”, “Fair” and “Poor”.

VIII. Reporting Requirements

- A. Grantee will provide the new Lease Agreements, the receipt of all other accounting expenses at time of move-in, the W-9 Tax information Form endorsed by the landlord/property manager, and other forms as needed by uploading to Launchpad on a weekly basis.
- B. Grantee will update Launchpad regarding activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives, including monitoring and documenting family CalWORKs eligibility with verification maintained in the case files for families case managed by Grantee. Grantee should update Launchpad in a timely manner, and by no later than the 5th of the following month. If the 5th of the month falls on a weekend or a holiday, the due date is extended to the following business day.
- C. Grantee will provide the CWHSP State Data report monthly through Launchpad by the 5th of the month. Grantee will provide monthly employment status in the State data report. If the 5th of the month falls on a weekend or a holiday, the due date is extended to the following business day.
- D. 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. Grantee will submit the annual report by the 15th of the month following the end of the program year. If the 15th of the month falls on a weekend or a holiday, the due date is extended to the following business day.
- E. Grantee will provide SOGI aggregate data in the CARBON database semi-annually by the 10th of the month following the end of the second and fourth quarters of the program year. If the 10th of the month falls on a weekend or a holiday, the due date is extended to the following business day.
- F. Grantee will provide Ad Hoc reports as required by the Department.

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

Leslie Lau at leslie.lau1@sfgov.org

Contract Manager, Office of Contract Management

- or -

Jiro Arase at jiro.arase@sfgov.org

Community Services Specialist, Welfare-to-Work Services Division

IX. Monitoring Activities

A. Program Monitoring:

Program monitoring will include a site visit, review of quarterly and annual reports, and review of case files and back-up documentation verifying progress towards meeting service and outcome objectives. The provider should bear in mind that performance will be measured in large part by program participants' success in maintaining stable housing for six months after receiving assistance.

B. Fiscal Compliance and Grant 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 MOU's, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D
1	Appendix B, Page 1			
2				
3	HUMAN SERVICES AGENCY BUDGET SUMMARY			
4	BY PROGRAM			
5	Name			Term 1/1/2021 - 6/30-2022
6	Abode Services			
7	(Check One) New <input checked="" type="checkbox"/> Renewal _____ Modification _____			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	Program: Housing Locator, Connector Services 1-21 to 6-22			
10	Budget Reference Page No.(s)			
11	Program Term	1/1/21-6/30/21	7/1/21-6/30/22	Total
12	Expenditures			
13	Salaries & Benefits	\$328,198	\$665,808	\$994,006
14	Operating Expense	\$95,000	\$213,600	\$308,600
15	Subtotal	\$423,198	\$879,408	\$1,302,606
16	Indirect Percentage (%)	14%	13%	\$0
17	Indirect Cost (Line 16 X Line 15)	\$58,350	\$114,361	\$172,711
18	Capital Expenditure	\$18,400	\$6,231	\$24,631
19	Direct Client Pass Through	\$383,886	\$1,368,762	\$1,752,648
20	Total Expenditures	\$883,834	\$2,368,762	\$3,252,596
21	HSA Revenues			
22	General Fund	\$97,222	\$260,564	\$357,786
23	Federal	\$273,988	\$734,316	\$1,008,305
24	State	\$512,624	\$1,373,882	\$1,886,506
25				
26				
27				
28				
29				
30	TOTAL HSA REVENUES	\$883,834	\$2,368,762	\$3,252,596
31	Other Revenues			
32				
33				
34				
35				
36				
37	Total Revenues	\$883,834	\$2,368,762	\$3,252,596
38	Full Time Equivalent (FTE)			
40	Prepared by:	Telephone No.:		Date
41	HSA-CO Review Signature: _____			
42	HSA #1	12/7/2020		

	A	B	C	D	E	F	G	I
1	Appendix B, Page 2							
2								
3								
4	Program Name:							
5	(Same as Line 9 on HSA #1)							
6								
7	Salaries & Benefits Detail							
8								
9								
10								
11						1/1/21-6/30/21	7/1/21-6/30/22	
		Agency Totals		HSA Program		DHS Program	DHS Program	TOTAL
		Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	1/0/00 to 2/0/00
12	POSITION TITLE							
13	<i>Program Director</i>	\$120,000	1.00	20%	0.20	\$12,000	\$18,000	\$30,000
14	<i>Program Manager</i>	\$90,000	1.00	100%	1.00	\$45,000	\$90,000	\$135,000
15	<i>Real Estate Lead</i>	\$85,000	1.00	50%	0.50	\$21,250	\$42,500	\$63,750
16	Housing Specialist	\$65,000	2.00	100%	2.00	\$62,292	\$130,000	\$192,292
17	Housing Service Coordinator	\$65,000	3.00	100%	3.00	\$93,438	\$195,000	\$288,438
18	Compliance Specialist	\$58,000	1.00	50%	0.50	\$14,500	\$29,000	\$43,500
19	Data Specialist	\$58,000	1.00	50%	0.50	\$14,500	\$29,000	\$43,500
20					-			\$0
21					-			\$0
22					-			\$0
23					-			\$0
24					-			\$0
25					-			\$0
26					-			\$0
27					-			\$0
28					-			\$0
29					-			\$0
30	TOTALS	\$ 541,000.00	10.00	470%	7.70	\$262,979	\$533,500	\$796,479
31								
32	FRINGE BENEFIT RATE	0.25						
33	EMPLOYEE FRINGE BENEFITS					\$65,219	\$132,308	\$197,527
34								
35								
36	TOTAL SALARIES & BENEFITS	\$541,000				\$328,198	\$665,808	\$994,006
37	HSA #2							12/7/2020

	A	B	C	D	E	F	G	J	K
1	Appendix B, page 3								
2									
3									
4	Program Name:								
5	(Same as Line 9 on HSA #1)								
6									
7	Operating Expense Detail								
8									
9									
10									
11	TOTAL								
12	<u>Expenditure Category</u>			TERM	<u>1/1/21-6/30/21</u>		<u>7/1/21-6/30/22</u>		
13	Rental of Property				\$27,500		\$48,000		\$75,500.00
14	Utilities(Elec, Water, Gas, Phone, Garbage)				\$2,400		\$4,800		\$7,200.00
15	Office Supplies, Postage				\$4,800		\$9,600		\$14,400.00
16	Building Maintenance Supplies and Repair								\$0.00
17	Printing and Reproduction								\$0.00
18	Insurance								\$0.00
19	Staff Training				\$4,000		\$3,000		\$7,000.00
20	Staff Travel-(Local & Out of Town)				\$15,600		\$31,200		\$46,800.00
21	Rental of Equipment								\$0.00
22	CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE								
23	Start up Consultant				\$6,500				\$6,500.00
24									\$0.00
25									\$0.00
26									\$0.00
27									\$0.00
28	OTHER								
29									
30	Rental Assistance Transaction Cost				\$34,200		\$117,000		\$151,200.00
31									\$0.00
32									\$0.00
33									\$0.00
34									
35	TOTAL OPERATING EXPENSE				\$95,000		\$213,600		\$308,600
36									
37	HSA #3								12/7/2020

	A	B	C	D	F
1					Appendix B, Page 4
2					
3					
4		Program Name:			
5		(Same as Line 9 on HSA #1)			
6					
7		Program Expenditure Detail			
8					
9					TOTAL
10		EQUIPMENT	TERM	1/1/21-6/30/21 7/1/21-6/30/22	
11	No.	ITEM/DESCRIPTION			
12		Laptops/ Docking Stations/ Monitors	\$18,400.00		\$18,400.00
13		Furniture/ Office Set up		\$6,231.00	\$6,231.00
14					\$0.00
15					\$0.00
16					\$0.00
17					\$0.00
18					\$0.00
19					\$0.00
20		TOTAL EQUIPMENT COST	\$18,400.00	\$6,231.00	\$24,631.00
21					
22		REMODELING			
23	Description:				\$0.00
24					\$0.00
25					\$0.00
26					\$0.00
27					\$0.00
28					\$0.00
29		TOTAL REMODELING COST	\$0.00	\$0.00	\$0.00
30					
31		TOTAL CAPITAL EXPENDITURE	\$18,400.00	\$6,231.00	\$24,631.00
32		(Equipment and Remodeling Cost)			
33		HSA #4			12/7/2020

APPENDIX A – Services to be Provided
Catholic Charities
CalWORKs Housing Locator, Housing Connector, and Housing Stabilization
January 1, 2021 – June 30, 2022

I. Purpose of Grant

To provide CalWORKs families meeting the California Department of Social Services (CDSS) definition of homelessness, with housing locator, housing connector, and housing stabilization and case management services to obtain and retain permanent housing.

II. Definitions

CalWORKs or CW	California Work Opportunity and Responsibility to Kids welfare-to-work program for families receiving Temporary Aid to Needy Families (TANF) cash aid.
CARBON	Contracts Administration, Reporting and Billing Online database
CES	Coordinated Entry System, a local or regional system for homeless families to be assessed, triaged and referred to housing and homeless services.
CWHSP	CalWORKs Housing Support Program, an integrated program of HSA staff and contracted services to place Homeless CalWORKs participants in permanent housing.
Grantee	Catholic Charities
Homeless	CDSS definition of homeless under the Housing Support Program, currently: <ol style="list-style-type: none"> 1) Lacking a fixed and regular nighttime residence; or 2) Having a primary nighttime residence that is a supervised publicly or privately operated shelter designed to provide temporary living accommodations; or 3) Residing in a public or private place not designed for, or ordinarily used as, a regular sleeping accommodation for human beings; or 4) In receipt of a judgment for eviction, as ordered by a court.
HSA	Human Services Agency of the City and County of San Francisco, also the Department
Launchpad	Web-based client tracking system used by HSA and all of its contracted service providers.

SOGI	Sexual Orientation and Gender Identity. A City ordinance requiring grantees to collect data concerning SOGI information on clients they serve.
SW	Human Service Agency Social Worker staff
WtW	Welfare-to-Work

III. Target Population

CalWORKs families, as referred by HSA staff, meeting the definition of Homelessness developed for this program by the California Department of Social Services as listed in Section II Definitions.

IV. Description of Services

Housing Locator Services

- A. Provide a list of units with descriptions for every housing match and placement process. Contractor will identify and establish a current list of available housing units for this program within the City and County of San Francisco and surrounding Bay Area Counties including but not limited to: Alameda, Contra Costa, Marin, Napa, San Mateo, Santa Clara, and Solano.
- B. Utilize a systematic approach to searching for suitable units, using standard real estate networking listings and publications, landlord outreach, and other methods. This should result in a portfolio of units that vary in size reflective of the CalWORKs families' needs, and that have monthly rent amounts that a family could conceivably assume without the help of a subsidy after exiting the Housing Support Program.
- C. Target housing search to neighborhoods where families have a higher likelihood of economic success, housing stability and overall well-being. Examples of criteria that can be used to determine likelihood of success include easy access to public transportation, access to high performing public schools, access to community-based supportive services and low rates of community violence.
- D. Maintaining a centralized, virtually accessible, listing of units with description and information on how to apply, within SF and beyond throughout the nine Bay Area surrounding counties, as appropriate, that is updated weekly and could be accessible to CalWORKs staff and assigned participants in the Housing Support Program.
- E. Provide post-placement landlord services as needed. After the housing placement and follow-up and retention service period, the Housing Services Locator is expected to become involved again with the families if there are problems with ongoing housing retention that may include arbitrating conflicts with the landlord. This service must be provided to all HSP families, regardless of whether case management is provided by SFHSA or by the contracted provider.
- F. Communicate frequently with the CalWORKs program and Housing Connector through emails, phone calls, and possibly web-based resources to disseminate information about housing resources, coordinate the matching of families to housing options, and navigate placement and retention in housing.

- G. Provide language capacity for service mirroring the needs of the CalWORKs population.

Housing Connector Services

- A. Operate in accordance with the Housing First philosophy and Rapid Rehousing model.
- B. Work with Housing Locator, the CalWORKs SW, and CalWORKs families to match and place the families with available housing units, and assist families throughout the lease application and placement process. NOTE: The referral process of families from CW SW to Grantee is done via Launchpad, and office space for Grantee could be made available at the CalWORKs site to improve coordination and streamline this process.
- C. Families referred by HSA will move to Housing Connector Services within 7 days from the date referred to Grantee by the CW HSP unit. At a minimum, families should be contacted and scheduled for intake.
- D. Transport families and show available units to determine a match.
- E. In collaboration with the CalWORKs SW and CalWORKs families, perform the appropriate housing matches between units and identified families, recommend housing options/solutions, and placement that includes making housing-related service referrals that lead to lease approval.
- F. Coordinate housing search process and provide responsive and collaborative effort focusing on the intensive beginning phase to match/place CalWORKs families with housing. This includes completing the housing application and assistance on obtaining required documentation to get the lease completed, providing a unit move-in to-do list to the families, and completing the move-in checklist requirements for CalWORKs program documentation.
- G. Families will be placed in permanent housing in an average of 30 days from the start of their housing search.
- H. Negotiate leases with landlords pertaining to families to be placed in their rental properties. Note: the lease needs to be a year in length and signed prior to move-in and sent to the CWHSP on a weekly basis.
- I. Conduct and document a pre-move-in inspection report of units considered for match and placement process to ensure basic habitability, safety and cleanliness. Note: this report should include documentation and photos to identify any pending repairs to be provided to CalWORKs SW prior to the move-in date.
- J. Work with the CalWORKs SW to identify, gather and coordinate families' eligible expenses and to issue expenditures for move-in such as the deposit, first and last month's rent, furniture, etc. Assist families in applying for move-in assistance from other sources on expenses that are not covered, as appropriate.
- K. Directly pay for approved housing search (including credit checks, application fees, paying off debt to utility companies, assistance in correcting erroneous unlawful detainers) and move-in costs (security deposit, first, second, and last month's rent, furniture), and other costs related to these program participant activities that are approved by CalWORKs per CWHSP guidelines.
- L. Educate families about their lease or occupancy agreement.
- M. Serve as the direct landlord liaison and communicate with the CalWORKs SW.
- N. Provide weekly progress report to the CalWORKs SW on the status of families in the matching and placement process.

- O. Track leased units in a database, noting occupancy dates and lease terms, any changes in ownership or property management. Share that information with HSA on a monthly basis for the ongoing subsidy payments.
- P. Communicate frequently with the CalWORKs program and Housing Stabilization provider through emails, phone calls, and possibly web-based resources to disseminate information about housing resources, coordinate the matching of families to housing options, and navigate placement and retention in housing.
- Q. Provide Neighborhood Welcome packets including information on local community services and resources and distribute the packet to families once placed.
- R. Provide language capacity for service mirroring the needs of the CalWORKs population.

Housing Stabilization and Case Management Services

- A. Provide wrap-around ongoing and dynamic housing case management until the family exits the CalWORKs Housing Support Program. Case management services to include:
 - 1. Develop a housing case management plan upon assuming case management. Plan should incorporate goals that support the family’s near-term housing retention and stability and that support the family’s ability to eventually move off of the subsidy while maintaining housing stability.
 - 2. At least monthly face-to-face meetings, or as otherwise appropriate during the COVID-19 public health emergency, with the family and its head of household upon assuming case management or following housing placement. Case management approach with the family needs to be assertive, responsive, supportive and collaborative that adjusts depending on the family’s situation. Other meetings in addition to the monthly face-to-face could either be in-office, via phone/web, or home visits depending upon the need.
 - 3. Provide participants with an up-to-date resource list with local social services and employment services providers when families are placed to actively support linkages to needed services in the new community and facilitate connection with local employment opportunities. Make warm referrals to community-based services whenever possible.
 - 4. Actively monitor and support program participant’s progress toward obtaining or maintaining employment and increasing income, where appropriate. This includes connecting all families who are ready to engage in employment or job readiness services with HSA’s JobsNOW program, provided that they are housed within commuting range of San Francisco, and establishing referral relationships with employment services providers in the community of residence.
 - 5. Actively monitor and support program participant’s housing retention and stability. Update the housing case management plan quarterly that includes housing goals with each family with a plan for when the subsidy ends.
 - 6. On an as needed basis, case management may entail coordinating with CWHSP and San Francisco’s CES to connect HSP program participants with deeper housing needs to the broader array of housing and homeless services available, including emergency shelter and permanent supportive housing.
- B. Provide follow-up housing placement and retention services to all placed CalWORKs families until exit from the program.

- C. Connect participants with local tenancy and eviction prevention services, when appropriate.
- D. Connect with local resources, agencies and supportive services. Provide Information and Referral to permanent housing resources including but not limited to public housing and Section 8. For families who fall out of HSP housing placement, every attempt will be made to link the family to the local CES.
- E. While receiving housing case management services, the Housing Services Locator may need to be involved again with the families if there are problems with ongoing housing retention that may include arbitrating conflicts with the landlord. This applies to all HSP families, regardless of whether case management is provided by SFHSA or by the contracted provider.
- F. Administer the rental subsidy for designated program participants and follow CWHSP program guidelines that include increasing the share of his or her monthly income towards the rent for families case managed by Grantee.
- G. Receive and maintain family CalWORKs eligibility documents from program participants on a monthly basis. Income reported to Case Manager must be verified.
- H. Verify program participants' ongoing CalWORKs eligibility monthly and notify CW SW if discontinued. Determine if program participant will continue receiving retention services under CW WtW and for how long. Per state regulations, families no longer active in CalWORKs or not receiving retention services will become ineligible for HSP.
- I. When applicable, verify CW WtW program participants' discontinuance letter in counties outside of San Francisco to determine if they are eligible for additional 12 months under San Francisco's WtW retention rules.
- J. Provide language capacity for service mirroring the needs of the CalWORKs population.

Employment Services

Grantee shall provide robust employment services that go beyond referrals to employment and training services. Services shall be provided to HSP participants residing in the designated counties, whether or not Grantee provides Housing Stability Case Management to the family. Grantee will leverage office spaces of other HSP contractors as appropriate to provide employment services to families.

- A. Create an Individual Employment Plan for each participant with specific goals and identifying the services to be provided. Align to the participant's CalWORKs Welfare-to-Work Plan if applicable, and coordinate supportive services with the Housing Stability Case Manager as needed.
- B. Provide individualized assistance for any employment/vocational barriers.
- C. Communicate with participants at least twice monthly. Communication may be done by phone, email or in person.
- D. Communicate with the Housing Stability Case manager on an ongoing basis and report participants' job placements in a timely manner.
- E. Develop relationships with employers in participants' new communities to identify job placement opportunities.
- F. Develop an in-depth knowledge of HSA's JobsNOW program and refer participants to the program for subsidized and unsubsidized job opportunities.

- G. Obtain verification of participant job placements. Verification will include a copy of a participant pay stub, a letter from the employer on business letterhead, or other method approved by HSA.

HSA Responsibilities

- A. CalWORKs SW will work closely together with Grantee staff on matching and housing placement. All program participants will have access to a full array of wrap-around services through their CalWORKs Housing SW. When an HSP program participant is re-housed outside of San Francisco, the CalWORKs SW will ensure a “warm handoff” to the CalWORKs program in the new county of residence.
- B. Provide office/desk space to Grantee staff while working at HSA site to better coordinate with CalWORKs staff.
- C. Provide Grantee with a direct linkage to JobsNOW for referral and to be abreast of program offerings.
- D. Develop a memorandum of understanding that outlines the coordination agreement and expectations on employment services for Grantee and the other HSP contractors.

V. Location and Time of Services

Grantee shall provide contracted services at Catholic Charities offices in San Francisco, other Catholic Charities locations, and at housing sites. Grantee staff will also work at CalWORKs offices as described above. Services are to be provided five days a week, between the hours of 9:00am and 5:00pm, some evenings and weekends, and at other times when necessary to best serve the needs of families. The nature of the Housing Locator and Housing Connector work will require extensive work in the community, including the surrounding counties.

VI. Service Objectives

The Grantee will meet the following Service Objectives:

- A. Provide Housing Locator and Housing Connector services to all referred CalWORKs families per year. Number of referrals made each year will be based on the agreed upon number of families to be placed in housing within the program year.
- B. Place 36 new families in housing annually.
- C. Provide ongoing case management and direct rent subsidy payments to referred CalWORKs families. Grantee will serve 54 families at any given time.
- D. Provide employment services to 80 families annually.

VII. Outcome Objectives

The Grantee will meet the following Outcome Objectives:

- A. 95% of families will remain stably housed 3 months after being placed.
- B. 85% of families placed who receive case management services from Grantee will retain housing 9 months after housing placement
- C. 50% of families placed who receive case management services will successfully exit the subsidy to stable housing 15 months after housing placement.
- D. 80% of families in HSP who receive case management services from Grantee that exit the program will exit to permanent housing

- E. 85% of families exiting HSP who receive case management services from Grantee should not become homeless within a year.
- F. A minimum of 75% of participants who receive employment services will obtain unsubsidized employment and/or increase their earned income within 12 months. For the purposes of this contract, success will be defined as job placement at 25 or more hours of employment within a 40-hour pay period or as an increase of 25% or more in earned income. Participant job placement or earnings information must be submitted to HSA with verification. Verification will include a copy of a participant pay stub, a letter from the employer on business letterhead, or other method approved by HSA.
- G. A minimum of 50% of HSP families served during a survey sample period shall complete a Client Satisfaction Survey. 80% of participants participating in the Client Satisfaction Survey will rate services as “Excellent” or “Good”. Grantee should include the following standardized questions: “How would you rate the [specific services] Program overall?”, “How would you rate staff responsiveness and follow-through with issues?”, “How would you rate staff effectiveness in connecting you to services in your new county of residence?” The options should be “Excellent”, “Good”, “Fair” and “Poor”. This survey will be conducted by Grantee according to HSA guidelines.
- H. CalWORKs staff involved in HSP shall complete a Client Satisfaction Survey. 80% of CalWORKs staff taking the Client Satisfaction Survey will rate services as “Excellent” or “Good”. Grantee should use the following standardized question: “How would you rate the [specific services] Program overall?” The options should be “Excellent”, “Good”, “Fair” and “Poor”.

VIII. Reporting Requirements

- A. Grantee will provide the new Lease Agreements, the receipt of all other accounting expenses at time of move-in, the W-9 Tax information Form endorsed by the landlord/property manager, and other forms as needed by uploading to Launchpad on a weekly basis.
- B. Grantee will update Launchpad regarding activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives, including monitoring and documenting family CalWORKs eligibility with verification maintained in the case files for families case managed by Grantee and employment status with hiring date and employer information. Grantee should update Launchpad in a timely manner, and by no later than the 5th of the following month.
- C. Grantee will provide the CWHSP State Data report monthly through Launchpad by the 5th of the month. Grantee will provide monthly employment status in the State data report. If the 5th of the month falls on a weekend or a holiday, the due date is extended to the following business day.
- D. 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. Grantee will submit the annual report by the 15th of the month following the end of the program year. If the 15th of the month falls on a weekend or a holiday, the due date is extended to the following business day.
- E. Grantee will provide SOGI aggregate data in the CARBON database semi-annually by the 10th of the month following the end of the second and fourth quarters of the

program year. If the 10th of the month falls on a weekend or a holiday, the due date is extended to the following business day.

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

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

Leslie Lau at leslie.lau1@sfgov.org

Contract Manager, Office of Contract Management

- or -

Jiro Arase at jiro.arase@sfgov.org

Community Services Specialist, Welfare-to-Work Services Division

IX. Monitoring Activities

A. Program Monitoring:

Program monitoring will include a site visit, review of quarterly and annual reports, and review of case files and back-up documentation verifying progress towards meeting service and outcome objectives. The provider should bear in mind that performance will be measured in large part by program participants' success in maintaining stable housing for six months after receiving assistance.

B. Fiscal Compliance and Grant 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 MOU's, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D
1				Appendix B, Page 1
2				Date: 10/19/2020
3				
4	HUMAN SERVICES AGENCY BUDGET SUMMARY			
5	BY PROGRAM			
6	Name	<u>Catholic Charities</u>		Term
7				1/1/21-6/30/22
8	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>			
9	If modification, Effective Date of Mod.		No. of Mod.	
10	Program: Housing Locator, Connector Services 1-21 to 6-22			
11	Budget Reference Page No.(s)			
12	Program Term	1/1/21-6/30/21	7/1/21-6/30/22	Total
13	Expenditures			
14	Salaries & Benefits	\$141,347	\$291,176	\$432,523
15	Operating Expense	\$31,237	\$56,474	\$87,711
16	Subtotal	\$172,584	\$347,650	\$520,234
17	Indirect Percentage (%)	15%	15%	\$0
18	Indirect Cost (Line 16 X Line 15)	\$25,887.67	\$52,147	\$78,035
19	Capital Expenditure	\$0	\$0	\$0
20	Direct Client Pass Through	\$388,000	\$846,000	\$1,234,000
21	Total Expenditures	\$586,472	\$1,245,797	\$1,832,269
22	HSA Revenues			
23	General Fund	\$64,512	\$137,038	\$201,550
24	Federal	\$340,154	\$722,562	\$1,062,716
25	State	\$181,806	\$386,197	\$568,004
26				
27				
28				
29				
30				
31	TOTAL HSA REVENUES	\$586,472	\$1,245,797	\$1,832,269
32	Other Revenues			
33				
34				
35				
36				
37				
38	Total Revenues	\$586,472	\$1,245,797	\$1,832,269
39	Full Time Equivalent (FTE)	2.04	4.08	
41	Prepared by: Delilah Perez	Telephone No.:	(415)972-1208	Date: 10/19/20
42	HSA-CO Review Signature: _____			
43	HSA #1			12/7/2020

	A	B	C	D	E	F	G	H	I
1	Appendix B, Page 3								
2	Date: 10/19/2020								
3	Catholic Charities								
4	Program Name: Housing Loc								
5	(Same as Line 9 on HSA #1)								
6									
7	Operating Expense Detail								
8									
9									
10									
11	TOTAL								
12	<u>Expenditure Category</u>			TERM	<u>1/1/21-6/30/21</u>	<u>7/1/21-6/30/22</u>	<u>1/1/2021-6/30/2022</u>		
13	Rental of Property				\$6,500	\$13,000	\$19,500		
14	Utilities(Elec, Water, Gas, Phone, Garbage)				\$2,500	\$5,000	\$7,500		
15	Office Supplies, Postage				\$1,000	\$2,000	\$3,000		
16	Building Maintenance Supplies and Repair				\$1,250	\$2,500	\$3,750		
17	Printing and Reproduction				\$350	\$700	\$1,050		
18	Insurance				\$2,500	\$5,000	\$7,500		
19	Staff Training				\$1,000	\$2,000	\$3,000		
20	Staff Travel-(Local & Out of Town)				\$600	\$1,200	\$1,800		
21	Rental of Equipment				\$1,537	\$3,074	\$4,611		
22	CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE								
23							\$0		
24	Janitor - commercial Cleaning				\$ 1,650	\$ 3,300	\$4,950		
25							\$0		
26							\$0		
27							\$0		
28	OTHER								
29									
30	Staff Related: Recruitment, Fingerprint				\$750	\$1,000	\$1,750		
31	Computer Related:				\$3,600	\$1,700	\$5,300		
32	Operating Vehicle:				\$6,000	\$12,000	\$18,000		
33	Client Transportation:				\$1,500	\$3,000	\$4,500		
34	Program Supplies:				\$500	\$1,000	\$1,500		
35									
36	TOTAL OPERATING EXPENSE				\$31,237	\$56,474	\$87,711		
37									
38	HSA #3								12/7/2020

APPENDIX A – Services to be Provided
Hamilton Families
CalWORKs Housing Locator, Housing Connector, and Housing Stabilization
January 1, 2021 – June 30, 2022

I. Purpose of Grant

To provide CalWORKs families meeting the California Department of Social Services (CDSS) definition of homelessness, with housing locator, housing connector, and housing stabilization and case management services to obtain and retain permanent housing.

II. Definitions

CalWORKs or CW	California Work Opportunity and Responsibility to Kids welfare-to-work program for families receiving Temporary Aid to Needy Families (TANF) cash aid.
CARBON	Contracts Administration, Reporting and Billing Online database
CES	Coordinated Entry System, a local or regional system for homeless families to be assessed, triaged and referred to housing and homeless services.
CWHSP	CalWORKs Housing Support Program, an integrated program of HSA staff and contracted services to place Homeless CalWORKs participants in permanent housing.
Grantee	Hamilton Families
Homeless	CDSS definition of homeless under the Housing Support Program, currently: <ol style="list-style-type: none"> 1) Lacking a fixed and regular nighttime residence; or 2) Having a primary nighttime residence that is a supervised publicly or privately operated shelter designed to provide temporary living accommodations; or 3) Residing in a public or private place not designed for, or ordinarily used as, a regular sleeping accommodation for human beings; or 4) In receipt of a judgment for eviction, as ordered by a court.
HSA	Human Services Agency of the City and County of San Francisco, also the Department
Launchpad	Web-based client tracking system used by HSA and all of its contracted service providers.

SOGI	Sexual Orientation and Gender Identity. A City ordinance requiring grantees to collect data concerning SOGI information on clients they serve.
SW	Human Service Agency Social Worker staff
WtW	Welfare-to-Work

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CalWORKs families, as referred by HSA staff, meeting the definition of Homelessness developed for this program by the California Department of Social Services as listed in Section II Definitions.

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- A. Provide a list of units with descriptions for every housing match and placement process. Contractor will identify and establish a current list of available housing units for this program within the City and County of San Francisco and surrounding Bay Area Counties including but not limited to: Alameda, Contra Costa, Marin, Napa, San Mateo, Santa Clara, and Solano.
- B. Utilize a systematic approach to searching for suitable units, using standard real estate networking listings and publications, landlord outreach, and other methods. This should result in a portfolio of units that vary in size reflective of the CalWORKs families' needs, and that have monthly rent amounts that a family could conceivably assume without the help of a subsidy after exiting the Housing Support Program.
- C. Target housing search to neighborhoods where families have a higher likelihood of economic success, housing stability and overall well-being. Examples of criteria that can be used to determine likelihood of success include easy access to public transportation, access to high performing public schools, access to community-based supportive services and low rates of community violence.
- D. Maintaining a centralized, virtually accessible, listing of units with description and information on how to apply, within SF and beyond throughout the nine Bay Area surrounding counties, as appropriate, that is updated weekly and could be accessible to CalWORKs staff and assigned participants in the Housing Support Program.
- E. Provide post-placement landlord services as needed. After the housing placement and follow-up and retention service period, the Housing Services Locator is expected to become involved again with the families if there are problems with ongoing housing retention that may include arbitrating conflicts with the landlord. This service must be provided to all HSP families, regardless of whether case management is provided by SFHSA or by the contracted provider.
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- G. Provide language capacity for service mirroring the needs of the CalWORKs population.

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- A. Operate in accordance with the Housing First philosophy and Rapid Rehousing model.
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- C. Families referred by HSA will move to Housing Connector Services within 7 days from the date referred to Grantee by the CW HSP unit. At a minimum, families should be contacted and scheduled for intake.
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- E. In collaboration with the CalWORKs SW and CalWORKs families, perform the appropriate housing matches between units and identified families, recommend housing options/solutions, and placement that includes making housing-related service referrals that lead to lease approval.
- F. Coordinate housing search process and provide responsive and collaborative effort focusing on the intensive beginning phase to match/place CalWORKs families with housing. This includes completing the housing application and assistance on obtaining required documentation to get the lease completed, providing a unit move-in to-do list to the families, and completing the move-in checklist requirements for CalWORKs program documentation.
- G. Families will be placed in permanent housing in an average of 30 days from the start of their housing search.
- H. Negotiate leases with landlords pertaining to families to be placed in their rental properties. Note: the lease needs to be a year in length and signed prior to move-in and sent to the CWHSP on a weekly basis.
- I. Conduct and document a pre-move-in inspection report of units considered for match and placement process to ensure basic habitability, safety and cleanliness. Note: this report should include documentation and photos to identify any pending repairs to be provided to CalWORKs SW prior to the move-in date.
- J. Work with the CalWORKs SW to identify, gather and coordinate families' eligible expenses and to issue expenditures for move-in such as the deposit, first and last month's rent, furniture, etc. Assist families in applying for move-in assistance from other sources on expenses that are not covered, as appropriate.
- K. Directly pay for approved housing search (including credit checks, application fees, paying off debt to utility companies, assistance in correcting erroneous unlawful detainers) and move-in costs (security deposit, first, second, and last month's rent, furniture), and other costs related to these program participant activities that are approved by CalWORKs per CWHSP guidelines.
- L. Educate families about their lease or occupancy agreement.
- M. Serve as the direct landlord liaison and communicate with the CalWORKs SW.
- N. Provide weekly progress report to the CalWORKs SW on the status of families in the matching and placement process.

- O. Track leased units in a database, noting occupancy dates and lease terms, any changes in ownership or property management. Share that information with HSA on a monthly basis for the ongoing subsidy payments.
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- Q. Provide Neighborhood Welcome packets including information on local community services and resources and distribute the packet to families once placed.
- R. Provide language capacity for service mirroring the needs of the CalWORKs population.

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 - 1. Develop a housing case management plan upon assuming case management. Plan should incorporate goals that support the family's near-term housing retention and stability and that support the family's ability to eventually move off of the subsidy while maintaining housing stability.
 - 2. At least monthly face-to-face meetings, or as otherwise appropriate during the COVID-19 public health emergency, with the family and its head of household upon assuming case management or following housing placement. Case management approach with the family needs to be assertive, responsive, supportive and collaborative that adjusts depending on the family's situation. Other meetings in addition to the monthly face-to-face could either be in-office, via phone/web, or home visits depending upon the need.
 - 3. Provide participants with an up-to-date resource list with local social services and employment services providers when families are placed to actively support linkages to needed services in the new community and facilitate connection with local employment opportunities. Make warm referrals to community-based services whenever possible.
 - 4. Actively monitor and support program participant's progress toward obtaining or maintaining employment and increasing income, where appropriate. This includes connecting all families who are ready to engage in employment or job readiness services with HSA's JobsNOW program, provided that they are housed within commuting range of San Francisco, and establishing referral relationships with employment services providers in the community of residence.
 - 5. Actively monitor and support program participant's housing retention and stability. Update the housing case management plan quarterly that includes housing goals with each family with a plan for when the subsidy ends.
 - 6. On an as needed basis, case management may entail coordinating with CWHSP and San Francisco's CES to connect HSP program participants with deeper housing needs to the broader array of housing and homeless services available, including emergency shelter and permanent supportive housing.
- B. Provide follow-up housing placement and retention services to all placed CalWORKs families until exit from the program.

- C. Connect participants with local tenancy and eviction prevention services, when appropriate.
- D. Connect with local resources, agencies and supportive services. Provide Information and Referral to permanent housing resources including but not limited to public housing and Section 8. For families who fall out of HSP housing placement, every attempt will be made to link the family to the local CES.
- E. While receiving housing case management services, the Housing Services Locator may need to be involved again with the families if there are problems with ongoing housing retention that may include arbitrating conflicts with the landlord. This applies to all HSP families, regardless of whether case management is provided by SFHSA or by the contracted provider.
- F. Administer the rental subsidy for designated program participants and follow CWHSP program guidelines that include increasing the share of his or her monthly income towards the rent for families case managed by Grantee.
- G. Receive and maintain family CalWORKs eligibility documents from program participants on a monthly basis. Income reported to Case Manager must be verified.
- H. Verify program participants' ongoing CalWORKs eligibility monthly and notify CW SW if discontinued. Determine if program participant will continue receiving retention services under CW WtW and for how long. Per state regulations, families no longer active in CalWORKs or not receiving retention services will become ineligible for HSP.
- I. When applicable, verify CW WtW program participants' discontinuance letter in counties outside of San Francisco to determine if they are eligible for additional 12 months under San Francisco's WtW retention rules.
- J. Provide language capacity for service mirroring the needs of the CalWORKs population.

Employment Services

Grantee shall provide robust employment services that go beyond referrals to employment and training services. Services shall be provided to HSP participants residing in the designated counties, whether or not Grantee provides Housing Stability Case Management to the family. Grantee will leverage office spaces of other HSP contractors as appropriate to provide employment services to families.

- A. Create an Individual Employment Plan for each participant with specific goals and identifying the services to be provided. Align to the participant's CalWORKs Welfare-to-Work Plan if applicable, and coordinate supportive services with the Housing Stability Case Manager as needed.
- B. Provide individualized assistance for any employment/vocational barriers.
- C. Communicate with participants at least twice monthly. Communication may be done by phone, email or in person.
- D. Communicate with the Housing Stability Case manager on an ongoing basis and report participants' job placements in a timely manner.
- E. Develop relationships with employers in participants' new communities to identify job placement opportunities.
- F. Develop an in-depth knowledge of HSA's JobsNOW program and refer participants to the program for subsidized and unsubsidized job opportunities.

- G. Obtain verification of participant job placements. Verification will include a copy of a participant pay stub, a letter from the employer on business letterhead, or other method approved by HSA.

HSA Responsibilities

- A. CalWORKs SW will work closely together with Grantee staff on matching and housing placement. All program participants will have access to a full array of wrap-around services through their CalWORKs Housing SW. When an HSP program participant is re-housed outside of San Francisco, the CalWORKs SW will ensure a “warm handoff” to the CalWORKs program in the new county of residence.
- B. Provide office/desk space to Grantee staff while working at HSA site to better coordinate with CalWORKs staff.
- C. Provide Grantee with a direct linkage to JobsNOW for referral and to be abreast of program offerings.
- D. Develop a memorandum of understanding that outlines the coordination agreement and expectations on employment services for Grantee and the other HSP contractors.

V. Location and Time of Services

Grantee shall provide contracted services at Hamilton Families offices in San Francisco, other Hamilton Families locations, and at housing sites. Grantee staff will also work at CalWORKs offices as described above. Services are to be provided five days a week, between the hours of 9:00am and 5:00pm, some evenings and weekends, and at other times when necessary to best serve the needs of families. The nature of the Housing Locator and Housing Connector work will require extensive work in the community, including the surrounding counties.

VI. Service Objectives

The Grantee will meet the following Service Objectives:

- A. Provide Housing Locator and Housing Connector services to all referred CalWORKs families per year. Number of referrals made each year will be based on the agreed upon number of families to be placed in housing within the program year.
- B. Place 90 new families in housing in FY20-21 and 60 new families in FY21-22.
- C. Provide ongoing case management and direct rent subsidy payments to referred CalWORKs families. In FY20-21, Grantee will serve 140 families at any given time. In FY21-22, Grantee will gradually reduce the housing stability caseload, with 80 families served at the end of the year.
- D. Provide employment services to 80 families annually.

VII. Outcome Objectives

The Grantee will meet the following Outcome Objectives:

- A. 95% of families will remain stably housed 3 months after being placed.
- B. 85% of families placed who receive case management services from Grantee will retain housing 9 months after housing placement.
- C. 50% of families placed who receive case management services will successfully exit the subsidy to stable housing 15 months after housing placement.

- D. 80% of families in HSP who receive case management services from Grantee that exit the program will exit to permanent housing.
- E. 85% of families exiting HSP who receive case management services from Grantee should not become homeless within a year.
- F. A minimum of 75% of participants who receive employment services will obtain unsubsidized employment and/or increase their earned income within 12 months. For the purposes of this contract, success will be defined as job placement at 25 or more hours of employment within a 40-hour pay period or as an increase of 25% or more in earned income. Participant job placement or earnings information must be submitted to HSA with verification. Verification will include a copy of a participant pay stub, a letter from the employer on business letterhead, or other method approved by HSA.
- G. A minimum of 50% of HSP families served during a survey sample period shall complete a Client Satisfaction Survey. 80% of participants participating in the Client Satisfaction Survey will rate services as “Excellent” or “Good”. Grantee should include the following standardized questions: “How would you rate the [specific services] Program overall?”, “How would you rate staff responsiveness and follow-through with issues?”, “How would you rate staff effectiveness in connecting you to services in your new county of residence?” The options should be “Excellent”, “Good”, “Fair” and “Poor”. This survey will be conducted by Grantee according to HSA guidelines.
- H. CalWORKs staff involved in HSP shall complete a Client Satisfaction Survey. 80% of CalWORKs staff taking the Client Satisfaction Survey will rate services as “Excellent” or “Good”. Grantee should use the following standardized question: “How would you rate the [specific services] Program overall?” The options should be “Excellent”, “Good”, “Fair” and “Poor”.

VIII. Reporting Requirements

- A. Grantee will provide the new Lease Agreements, the receipt of all other accounting expenses at time of move-in, the W-9 Tax information Form endorsed by the landlord/property manager, and other forms as needed by uploading to Launchpad on a weekly basis.
- B. Grantee will update Launchpad regarding activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives, including monitoring and documenting family CalWORKs eligibility with verification maintained in the case files for families case managed by Grantee and employment status with hiring date and employer information. Grantee should update Launchpad in a timely manner, and by no later than the 5th of the following month.
- C. Grantee will provide the CWHSP State Data report monthly through Launchpad by the 5th of the month. Grantee will provide monthly employment status in the State data report. If the 5th of the month falls on a weekend or a holiday, the due date is extended to the following business day.
- D. 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. Grantee will submit the annual report by the 15th of the month following the end of the program year. If the 15th of the month falls on a weekend or a holiday, the due date is extended to the following business day.

- E. Grantee will provide SOGI aggregate data in the CARBON database semi-annually by the 10th of the month following the end of the second and fourth quarters of the program year. If the 10th of the month falls on a weekend or a holiday, the due date is extended to the following business day.
- F. Grantee will provide Ad Hoc reports as required by the Department.

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

Leslie Lau at leslie.lau1@sfgov.org

Contract Manager, Office of Contract Management

- or -

Jiro Arase at jiro.arase@sfgov.org

Community Services Specialist, Welfare-to-Work Services Division

IX. Monitoring Activities

A. Program Monitoring:

Program monitoring will include a site visit, review of quarterly and annual reports, and review of case files and back-up documentation verifying progress towards meeting service and outcome objectives. The provider should bear in mind that performance will be measured in large part by program participants' success in maintaining stable housing for six months after receiving assistance.

B. Fiscal Compliance and Grant 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 MOU's, 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				
3	HUMAN SERVICES AGENCY BUDGET SUMMARY			
4	BY PROGRAM			
5	Agency Name:			
6	Hamilton Families			
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 Name: Housing Locator, Connector Services 1-21 to 6-22			
10	Budget Reference Page No.(s)			
11	Program Term:		01/01/2021-6/30/2021	07/01/21-06/30/22
12	Expenditures			
13	Salaries & Benefits	\$414,887	\$866,538	\$1,281,425
14	Operating Expense	\$102,650	\$162,465	\$265,115
15	Subtotal	\$517,537	\$1,029,003	\$1,546,540
16	Indirect Percentage (%)	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$77,630	\$154,350	\$231,980
18	Capital Expenditure	\$0	\$0	\$0
19	Direct Client Pass Through	\$1,149,500	\$1,960,080	\$3,109,580
20	Total Expenditures	\$1,744,667	\$3,143,433	\$4,888,100
21	HSA Revenues			
22	General Fund	\$191,913	\$345,778	\$537,691
23	Federal	\$1,011,907	\$1,823,191	\$2,835,098
24	State	\$540,847	\$974,464	\$1,515,311
25				\$0
26				\$0
27				\$0
28				\$0
29				\$0
30	TOTAL HSA REVENUES	\$1,744,667	\$3,143,433	\$4,888,100
31	Other Revenues			
32				
33				
34				
35				
36				
37	Total Other Revenues	\$1,744,667	\$3,143,433	\$4,888,100
38	Full Time Equivalent (FTE)			
40	Prepared by: Rosa M. Martinez		Telephone: (415)321-2612 x 123	
41	HSA-CO Review Signature: _____			
42	HSA #1			

