

File No. 250895

Committee Item No. 10

Board Item No. _____

COMMITTEE/BOARD OF SUPERVISORS

AGENDA PACKET CONTENTS LIST

Committee: Budget and Finance Committee Date September 17, 2025

Board of Supervisors Meeting Date _____

Cmte Board

- | | | |
|-------------------------------------|--------------------------|--|
| ☐ | ☐ | Motion |
| ☒ | ☐ | Resolution |
| ☐ | ☐ | Ordinance |
| ☐ | ☐ | Legislative Digest |
| ☐ | ☐ | Budget and Legislative Analyst Report |
| ☐ | ☐ | Youth Commission Report |
| ☐ | ☐ | Introduction Form |
| ☒ | ☐ | Department/Agency Cover Letter and/or Report |
| • HSH Memo 8/21/2025 | | |
| • MYR Memo 9/2/2025 | | |
| ☐ | ☐ | MOU |
| ☒ | ☐ | Grant Information Form |
| ☒ | ☐ | Grant Budget |
| ☐ | ☐ | Subcontract Budget |
| ☐ | ☐ | Contract/Agreement |
| ☐ | ☐ | Form 126 – Ethics Commission |
| ☒ | ☐ | Award Letter |
| ☒ | ☐ | Application |
| ☐ | ☐ | Public Correspondence |

OTHER (Use back side if additional space is needed)

- | | | |
|-------------------------------------|--------------------------|--|
| ☒ | ☐ | <u>Notification of Eligibility 3/14/2025</u> |
| ☒ | ☐ | <u>HSH Memo on Retroactivity 8/7/2025</u> |
| ☒ | ☐ | <u>HSH Presentation 9/17/2025</u> |
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Completed by: Brent Jalipa Date September 11, 2025

Completed by: Brent Jalipa Date _____

1 [Subgrant Agreement - Accept and Expend Grant - Retroactive - The Urban Institute - Just
2 Home Cohort 1 Continuation Funds - Not to Exceed \$200,000]

3 **Resolution authorizing the Department of Homelessness and Supportive Housing**
4 **(“HSH”) to execute a Subgrant Agreement with The Urban Institute for a total amount**
5 **not to exceed \$200,000 of Just Home Cohort 1 Continuation Funds; to retroactively**
6 **accept and expend those grant funds to support continued project management of the**
7 **Just Home Program for costs incurred June 15, 2025, through September 30, 2026; and**
8 **authorizing HSH to enter into any additions, amendments, or other modifications to the**
9 **Subgrant Agreement that do not materially increase the obligations or liabilities of the**
10 **City or materially decrease the benefits to the City.**

11
12 WHEREAS, The Department of Homelessness and Supportive Housing’s (“HSH”) mission is to prevent homelessness when possible and to make homelessness a rare, brief,
13 and one-time experience in San Francisco through the provision of coordinated,
14 compassionate, and high-quality services; and

15
16 WHEREAS, In April 2023, HSH released the five-year strategic plan “Home by the
17 Bay: An Equity-Driven Plan to Prevent and End Homelessness in San Francisco” which
18 includes goals related to working with other city agencies to support more coordinated,
19 comprehensive and equitable pathways to housing from those involved in the criminal
20 justice system; and

21 WHEREAS, In May 2022, the MacArthur Foundation and The Urban Institute (“Urban
22 Institute”) announced the launch of the Just Home Project, a national program designed to
23 advance community-driven efforts to break the links between housing instability and jail
24 incarceration; and

1 WHEREAS, San Francisco was one of the four communities selected to participate in
2 the Just Home Project, and the City received initial grant funding to support the launch and
3 implementation of the program; and

4 WHEREAS, HSH is the City's lead agency for the Just Home Project in San Francisco,
5 and has worked to build relationships and active partnerships with San Francisco's criminal
6 justice agencies and system partners to support the collective development of a more
7 comprehensive, equitable and coordinated system to bridge significant siloes between the
8 homelessness, housing, and criminal justice systems (the "Just Home Program"); and

9 WHEREAS, In March 2023, HSH hired a Manager of Housing and Justice Systems
10 Initiatives to ensure full implementation of the Just Home Program, including the Program
11 Related Investment ("PRI") housing project, data integration and evaluation, and systems
12 change work facilitated by the project; and

13 WHEREAS, Urban Institute notified HSH on March 14, 2025, that the department was
14 eligible to apply for up to \$200,000 in Just Home Cohort 1 Continuation Funds ("Just Home
15 Continuation Funds") to support continued project management, community engagement or
16 evaluation of program performance of the Just Home Program through Fall 2026 (the
17 "Eligibility Notification"), a copy of which is on file with the Clerk of the Board of Supervisors
18 ("Clerk") in File No. 250895; and

19 WHEREAS, On April 10, 2025, HSH submitted an application to Urban Institute for Just
20 Home Continuation Funds for \$200,000, the maximum amount of funding available, a copy of
21 the Application is on file with the Clerk in File No. 250895; and

22 WHEREAS, On July 15, 2025, Urban Institute agreed to award Just Home
23 Continuation Funds to HSH in an amount not to exceed \$200,000 ("Award Notice"), subject to
24 the terms and conditions of the Subgrant Agreement ("Agreement"); copies of the Award
25 Notice and Agreement are on file with the Clerk in File No. 250895; and

1 WHEREAS, HSH will use the \$200,000 to support the salary and fringe benefits of the
2 HSH Manager of Housing and Justice Systems Initiatives from June 15, 2025, through
3 September 30, 2026, as reflected in the Agreement and Grant Budget, a copy of the Grant
4 Budget is on file with the Clerk in File No. 250895; and

5 WHEREAS, A request for retroactive approval is being sought because HSH received
6 the Agreement on July 15, 2025, for a term start date of June 15, 2025; and

7 WHEREAS, The Just Home Continuation Funds does not create any new positions,
8 and does not require an amendment to the Annual Salary Ordinance; and

9 WHEREAS, HSH proposes to maximize use of available grant funds on proposed
10 expenditures by not including indirect costs in the grant budget; now, therefore, be it

11 RESOLVED, That the Board of Supervisors waives inclusion of indirect costs in the
12 grant budget; and, be it

13 FURTHER RESOLVED, The Executive Director of HSH or their designee is authorized,
14 in consultation with the City Attorney, to enter into, execute, and deliver a Subgrant
15 Agreement for a total amount not to exceed \$200,000 and any and all other documents
16 required or deemed necessary or appropriate to secure Just Home Continuation Funds from
17 Urban Institute, and any further amendments thereto (collectively, the "Just Home
18 Continuation Funds Documents"); and, be it

19 FURTHER RESOLVED, HSH is authorized to retroactively accept and expend up to
20 \$200,000 of Just Home Continuation Funds for continued project management of the Just
21 Home Program pursuant to Administrative Code, Section 10.170-1; and, be it

22 FURTHER RESOLVED, HSH is authorized and directed to ensure that any Just Home
23 Continuation Funds awarded are spent by September 30, 2026; and, be it

24 FURTHER RESOLVED, The City acknowledges that it shall be subject to the terms
25 and conditions specified in the Subgrant Agreement; and, be it

1 FURTHER RESOLVED, That all actions authorized and directed by this Resolution and
2 heretofore taken are ratified, approved, and confirmed by this Board of Supervisors; and, be it

3 FURTHER RESOLVED, That within thirty days of the execution of the Agreement by all
4 parties, HSH shall provide a copy of the fully executed Agreement to the Clerk for inclusion in
5 the official file.

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Shireen McSpadden
Homelessness and Supportive Housing
Executive Director

Controller's Office

Mayor's Office

File Number: 250895
(Provided by Clerk of Board of Supervisors)

Grant Resolution Information Form
(Effective July 2011)

Purpose: Accompanies proposed Board of Supervisors resolutions authorizing a Department to accept and expend grant funds.

The following describes the grant referred to in the accompanying resolution:

1. **Grant Title:** Just Home Cohort 1 Continuation Funds - \$200,000
2. **Department:** Department of Homelessness and Supportive Housing
3. **Contact Person:** Dylan Schneider **Telephone:** 628.652.7742
4. **Grant Approval Status (check one):**

☒ **Approved by funding agency** ☐ **Not yet approved**

5. **Amount of Grant Funding Approved or Applied for:** not to exceed \$200,000

6. a. **Matching Funds Required:** No match funds required
b. **Source(s) of matching funds (if applicable):**
7. a. **Grant Source Agency:** John D. and Catherine T. MacArthur Foundation
b. **Grant Pass-Through Agency (if applicable):** The Urban Institute

8. **Proposed Grant Project Summary:** HSH is the lead agency for the Just Home Program in San Francisco and was awarded \$200,000 through the Just Home Cohort 1 Continuation Funds to support continued project management of the Program. Continuation Funds will be used to ensure successful implementation of the site's planned project goals, sustaining local partnerships, implementing project components and managing shared resources across multiple city departments and organizations. The Manager of Housing and Justice Initiatives will ensure full implementation of the Just Home Program, including the Program Related Investment (PRI) housing project, data integration and evaluation, and systems change work facilitated by the project. Current project components of Just Home are expected to be completed by Fall 2026.

9. **Grant Project Schedule, as allowed in approval documents, or as proposed:**

Start-Date: June 15, 2025 End-Date: September 30, 2026

10. a. **Amount budgeted for contractual services:** None.
b. **Will contractual services be put out to bid?** n/a
c. **If so, will contract services help to further the goals of the Department's Local Business Enterprise (LBE) requirements?** n/a
d. **Is this likely to be a one-time or ongoing request for contracting out?** n/a
11. a. **Does the budget include indirect costs?**
☐ Yes ☒ No
b. 1. **If yes, how much?**
b. 2. **How was the amount calculated?**
c. 1. **If no, why are indirect costs not included?**

☐ Not allowed by granting agency

☐ To maximize use of grant funds on direct services

[X] Other (please explain): Indirect costs were not built in, so that the position funded could be fully supported and in order to maximize use of grant funds.

c. 2. If no indirect costs are not included, what would have been the indirect costs? 5% or approximately \$10,000.

12. Any other significant grant requirements or comments:

Department ID: 203646 - HOM PROGRAMS
Fund ID: 12910 – SR Human Welfare-Grants Oth
Project ID: 10038932 - HOM MacArthur Foundation
Activity ID: 0001 - HOM MacArthur Foundation
Authority ID: 10001 - Grants

****Disability Access Checklist** (Department must forward a copy of all completed Grant Information Forms to the Mayor's Office of Disability)**

13. This Grant is intended for activities at (check all that apply):

- | | | |
|--|---|---|
| ☐ Existing Site(s) | ☐ Existing Structure(s) | ☒ Existing Program(s) or Service(s) |
| ☐ Rehabilitated Site(s) | ☐ Rehabilitated Structure(s) | ☐ New Program(s) or Service(s) |
| ☐ New Site(s) | ☐ New Structure(s) | |

14. The Departmental ADA Coordinator or the Mayor's Office on Disability have reviewed the proposal and concluded that the project as proposed will be in compliance with the Americans with Disabilities Act and all other Federal, State and local disability rights laws and regulations and will allow the full inclusion of persons with disabilities. These requirements include, but are not limited to:

1. Having staff trained in how to provide reasonable modifications in policies, practices and procedures;
2. Having auxiliary aids and services available in a timely manner in order to ensure communication access;
3. Ensuring that any service areas and related facilities open to the public are architecturally accessible and have been inspected and approved by the DPW Access Compliance Officer or the Mayor's Office on Disability Compliance Officers.

If such access would be technically infeasible, this is described in the comments section below:

Comments:

Departmental ADA Coordinator or Mayor's Office of Disability Reviewer:

Cody Eliff
(Name)

ADA Coordinator, Department of Homelessness and Supportive Housing
(Title)

Date Reviewed: 8/21/2025

Signed by:
Cody A Eliff
(Signature Required)

Department Head or Designee Approval of Grant Information Form:

Gigi Whitley
(Name)

Deputy Director of Administration and Finance
(Title)

8/21/2025

Date Reviewed:

DocuSigned by:
Gigi Whitley
(Signature Required)



**COST REIMBURSEMENT SUBGRANT
Part I - SUBGRANT SCHEDULE**

AWARD INFORMATION

1. Urban Institute The Urban Institute 500 L'Enfant Plaza SW Washington, DC 20024	2. Subrecipient The City and County of San Francisco Department of Homelessness and Supportive Housing 440 Turk Street San Francisco, CA 94102
3. Urban Institute Contractual Contact Lisa Fischer Director, Department of Subawards 202-261-5338 lfischer@urban.org	4. Subrecipient Contractual Contact Jocelyn Everroad Manager of Planning & Strategy 628-652-7707 jocelyn.everroad@sf.gov
5. Urban Institute Technical Contact Emma Fernandez Policy Program Associate efernandez@urban.org	6. Subrecipient Technical Contact Same as above.
7. Urban Project Information Project Title: Just Home Cohort 1 Continuation Urban Project Number: 103096 Prime Award Number: 23-2308-157954-CJ	8. Subgrant Number: 103096-0001-SFHSH-01
	9. Subgrant Amount: \$200,000
	10. Subgrant Period of Performance: June 15, 2025 – September 30, 2026

RECITALS:

This subgrant agreement ("Agreement"), under Prime Award Number 23-2308-157954-CJ ("Prime Award") with the John D. and Catherine T. MacArthur Foundation ("Funder"), is entered into by and between The Urban Institute ("Urban"), a non-profit entity organized and existing under the laws of Delaware, having its principal place of business at 500 L'Enfant Plaza SW, Washington, DC 20024, and the City and County of San Francisco ("Subrecipient"), acting through the Department of Homelessness and Supportive Housing, a city and county local government entity having its principal place of business at 440 Turk Street, San Francisco, CA 94102. Urban and Subrecipient shall each be referred to herein as a "Party" or collectively as the "Parties".

THEREFORE, THE PARTIES AGREE AS FOLLOWS:

1. PURPOSE OF THE SUBGRANT

- 1.1. The purpose of this Agreement is to fund Subrecipient's continuation of work under 102418-0001-SFHSH-01, with the primary goals of safely reducing jail population/jail use in San Francisco and reducing disparities and other inequities in San Francisco's homelessness response and criminal legal systems. These efforts will be carried out as set forth in Appendix A.

2. KEY PERSONNEL

- 2.1. "Key Personnel" refers to individual(s) identified as uniquely important to the success of the project under this Agreement. The Parties acknowledge that these individuals are a critical element to project performance. Subrecipient must obtain prior written approval from Urban before making any changes to the Key Personnel during the term of this Agreement. The Subrecipient shall submit such requests in writing to Urban's Contractual and Technical Contacts, to include justification for such a change and qualifications of the proposed replacement. Only Urban's Contractual Contact may provide formal written approval for such a change. Urban reserves the right to terminate this Agreement if it, in its reasonable discretion, determines that a change in Key Personnel would negatively affect the quality of the Work Product. Subrecipient shall not be entitled to any additional costs or claims resulting from the removal or replacement of Key Personnel.
- 2.2 Subrecipient Key Personnel under this Agreement:
Aaqilah Islam, Manager of Housing and Justice System Initiatives

3. TYPE OF SUBGRANT AND AMOUNT

- 3.1. This is a cost reimbursement subgrant awarded in the amount of \$200,000. The Subrecipient agrees to pursue the programmatic objective(s) specified in Appendix A within the total award amount.
- 3.2 The Parties acknowledge that this Agreement is contingent upon funding from the Funder. If the Funder reduces the funding, delays, withdraws funding, or materially modifies the scope of the work in any way that affects this Agreement, Urban reserves the right to renegotiate the terms of this Agreement or terminate the Agreement in accordance with Part II, section 4.2.

4. PERIOD OF PERFORMANCE

- 4.1. The period of performance for this Agreement is designated as June 15, 2025 through September 30, 2026. The Parties may extend the Agreement through a modification which shall be executed by both Parties.

5. REIMBURSEMENT PROVISIONS

- 5.1. **Reimbursement:** Reimbursement for allowable costs incurred will be made either via check or ACH credit transfer (preferred method). To receive payment via ACH credit transfer, if a new vendor to Urban, Subrecipient should request Urban's ACH Authorization Form from the Accounts Payable department (accountspayable@urban.org) prior to the submission of any request.
- 5.2. **Submission of Invoices:** Proper invoices shall be submitted as an attached file in Portable Document Format (PDF) emailed to accountspayable@urban.org, copied to Urban's Technical Contact. The subject line of the email should include the subgrant Number and indicate an invoice is attached. Invoices shall be submitted according to the following schedule:

Invoice	Invoice Time Period	Due Date
1	June 15, 2025 – September 30, 2025	October 31, 2025
2	October 1, 2025 – December 31, 2025	January 31, 2026
3	January 1, 2026 – March 31, 2026	April 30, 2026
4	April 1, 2026 – June 30, 2026	July 31, 2026
5	July 1, 2026 – September 30, 2026	November 14, 2026

- 5.3. **Invoice:** Reimbursement will be provided following the acceptance of a proper invoice which shall contain the following:
- Subrecipient's name and complete address.
 - Urban Agreement number and period of performance.
 - Invoice date.
 - Period covered by invoice.
 - Costs incurred and requested for reimbursement detailed according to approved Budget (Appendix B).
 - Total amount of expenditures requested for reimbursement for the invoice period; and total expenditures cumulatively.
 - Name, title, and contact information, along with dated signature of responsible official and certification by the following or similar statement: "By signing this request, Subrecipient certifies that it is properly entitled to payment and that all payments requested are for appropriate purposes and in strict accordance with the terms and conditions set forth in the Agreement".

- 5.4. **Final Payment:** A final invoice for all payments due to Subrecipient shall be submitted no later than forty-five (45) days after the expiration of this Agreement and must be clearly labeled “FINAL”. Payment of the final invoice will terminate any obligation of Urban for any additional reimbursements to the Subrecipient under this Agreement.

6. MANAGEMENT AND USE OF FUNDS

- 6.1. **Charitable Purpose:** Subrecipient agrees to use the funds for the purposes as outlined in this Agreement and exclusively for charitable scientific, and/or education purposes as defined by Internal Revenue Code within the meaning of Section 501(C)(3) and equivalent provisions of applicable law.
- 6.2. **Indirect costs:** Subrecipient has elected not to charge indirect costs.
- 6.3. **Use and Expenditure of Funds:** Agreement funds shall be expended in accordance with the approved Agreement budget attached to this document as Appendix B. Subrecipient is permitted to transfer up to 10% of an existing direct cost line-item category or \$10,000—whichever is greater—to that line-item category; however, prior approval is required for any budget deviations exceeding this threshold, adding a new line-item or adding funds to indirect costs. The request for approval should include detailed justification for such budget revisions and be sent to Urban’s Technical Contact. Urban’s Contractual Contact will determine if a formal modification to the Agreement is required.

7. PROGRESS REPORTS AND REPORTING SCHEDULE

- 7.1. **Progress Reports:** The Subrecipient shall submit narrative progress reports in accordance with the schedule below. Each report shall summarize activities and describe progress and challenges associated with meeting the goals outlined in Appendix A. Specific formats may be suggested or prescribed by Urban.

Report	Reporting Time Period	Due Date
1	June 15, 2025 – September 30, 2025	October 31, 2025
2	October 1, 2025 – December 31, 2025	January 31, 2026
3	January 1, 2026 – March 31, 2026	April 30, 2026
4	April 1, 2026 – June 30, 2026	July 31, 2026
5	June 15, 2025 – September 30, 2026	October 30, 2026

- 7.2. **Final Progress Report:** The final progress report shall cover the entire period of the Agreement and include a summary of progress and relevant major accomplishments during the Agreement period, an explanation of

challenges encountered in the process of carrying out subgrant activities, a detailed description of findings and/or outcomes, and an assessment of impact and/or implications for future work. This report shall be submitted thirty (30) days after the end of the Agreement Period of Performance.

- 7.3. **Report Distribution:** All reports should be submitted as a PDF attachment via e-mail to the Urban Technical Contact.

8. NOTICES

- 8.1. Any notices submitted by either Party to the other under this Agreement will be in writing and sent by mail or e-mail and sent using the contact information listed in the Award Information table on page one (1) of this Agreement.

9. ENTIRE AGREEMENT

- 9.1. This Agreement, together with the Appendices attached hereto, represents the entire understanding of the Parties with respect to its subject matter, and it supersedes all prior agreements, understandings, or representations, whether oral or written, by either Party.

IN WITNESS WHEREOF, the Subrecipient and Urban, each acting through its duly authorized representative, have caused this Agreement to be signed on the dates below.

FOR URBAN:

FOR SUBRECIPIENT:

(Signature)

(Signature)

(Name)

(Name)

(Title)

(Title)

(Date)

(Date)

PART II - GENERAL TERMS AND CONDITIONS

1. RELATIONSHIP BETWEEN THE PARTIES

- 1.1. **Independent Parties:** For purposes hereof, Subrecipient is an independent contractor, and shall not be deemed to be an employee or agent of Urban or the Funder. Neither shall the Funder nor any of its departments, agencies, or employees be a party to this Agreement and all communications regarding this Agreement shall be directed to Urban and not the Funder.
- 1.2. **Confidential Information:** Each Party agrees to protect and safeguard any item of proprietary or otherwise privileged or confidential information ("Confidential Information") received during the term of this Agreement and not disclose such Confidential Information of the other party without prior written consent of the other party, subject to the requirements of state and local public records laws.
- 1.3. **Organizational Conflict of Interest:** Subrecipient represents that, to the best of its knowledge and belief, that at the time of the signing of this Agreement, it is not adversely affected by an organizational conflict of interest. Subrecipient agrees that if an actual or apparent organizational conflict of interest is discovered after award execution, it will make a disclosure in writing to Urban. Should Urban determine that an organization conflict of interest exists or may exist that cannot be reasonably mitigated, the Agreement may be terminated at Urban's discretion without liability to Urban or the Funder.
- 1.4. **Limitation of Liability and Indemnification:** The Parties agree that Urban and the Funder shall not be liable for any third-party claims arising out of or resulting from Subrecipient's breach, negligence and/or willful misconduct in performance of this Agreement, or for the unauthorized use of patented or copyrighted materials by Subrecipient.

Subrecipient agrees, to the fullest extent permitted by law, to indemnify, defend and hold harmless Urban and the Funder from any third-party claims, demands, actions, suits and proceedings, and liability, loss, expense (including reasonable attorney's fees), costs or damages, arising out of or related to, and to the proportionate extent caused by Subrecipient's (a) breach of any term, provision, covenant or warranty made in this Agreement, and/or (b) inaccuracy of any certification or representation made in this Agreement, and/or (c) negligent acts or omissions and/or willful misconduct in performance of this Agreement.

Each Party shall promptly notify the other Party of the assertion, filing, or service of any lawsuit, claim, demand, action, liability or other matter that

is covered by this indemnity. Subrecipient shall have the right to direct the defense of any lawsuit, claim, demand or liability covered by this indemnity.

2. STANDARDS OF CONDUCT

2.1. **Debarment and Suspension:** By signing this Agreement, Subrecipient certifies that neither it nor its principals are presently debarred, suspended, proposed for debarment, by any US Federal department or agency. Any change in the debarred or suspended status of the Subrecipient during the life to this Agreement must be reported immediately to Urban.

2.2. **Anti-Lobbying:**

Subrecipient agrees not to use any portion of the Agreement to:

- Pay fees or wages for the services of fundraising firms.
- Influence legislation within the meaning of Internal Revenue Code Section 501(h).
- Carry on propaganda or otherwise attempt to influence legislation within the meaning of Section 4945(d)(1) of the Code.
- Influence the outcome of any specific public election or to carry on, directly or indirectly, any voter registration drive within the meaning of Section 4945(d)(2) of the Code. Activities shall be conducted consistent with the private foundation lobbying rules and exceptions under Internal Revenue Code Section 4945 and related regulations.
- Promote or engage in criminal acts of violence, terrorism, hate crimes, the destruction of any state, or discrimination on the basis of race, national origin, religion, military and veteran status, disability, sex, age, or sexual orientation, or support of any entity that engages in these activities.

2.3. **Equal Employment Opportunity:** All contracts to be performed in the United States, or to be performed with employees who were recruited in the United States, shall contain a provision requiring compliance with E.O. 11246, "Equal Employment Opportunity", as amended by E.O. 11375, "Amending Executive Order 11246 Relating to Equal Employment Opportunity".

2.4. **Discrimination Prohibited:** Subrecipient shall not discriminate against any employee or applicant to be employed in the performance of this Agreement with respect to the hire, tenure, term, conditions, or privileges of employment because of his/her race, color, religion, gender identity, sexual orientation, disability, national origin, ancestry, or status as a veteran. Subrecipient shall also comply with all applicable federal provisions, statutes and regulations relating to nondiscrimination and

equal employment opportunity including all relevant sections of the American with Disabilities Act of 1990. Subrecipient shall not discharge, demote, suspend, threaten, harass, retaliate against, or otherwise discriminate against, any of its employees in the terms and conditions of such employee's employment as a reprisal for such employee's disclosing to Urban, or other proper authority, information relating to violation of this article, including, without limitation, any substantial violation of law relating to the performance of this Agreement.

- 2.5. **Human Subjects Research:** The Subrecipient is responsible for the protection of the rights and welfare of any human subjects involved in research, development and related activities supported by this Agreement. The Subrecipient, and any lower tier subrecipients or contractors, shall also comply with all applicable federal provisions, statutes and regulations relating to the protection and privacy of human subjects, and the law and regulations of individual states. Such requirements include but are not limited to conducting the research in compliance with the ethical standards and the criteria for approval and conduct of research set forth in United States Department of Health and Human Services policy for the protection of human research subjects (45 C.F.R. Part 46 and related guidance, as amended from time to time). Subrecipient shall obtain and maintain institutional review board (IRB) approval, either by an internal IRB or through a contracted agency and obtain informed consent of participating research subjects. Subrecipient must notify Urban immediately of any breach of personally identifiable information (PII) or any other violation related to the requirements stated herein and shall indemnify Urban and Funder against any such violations.
- 2.6. **Anti-Terrorism:** Subrecipient agrees that Agreement funds shall be used in compliance with all applicable anti-terrorism financing and asset control laws and regulations; no part of the Agreement funds may be used to support or promote violence or terrorist activities.

3. WORK PRODUCT AND ACKNOWLEDGMENTS

- 3.1. **Intellectual Property:**
 - 3.1.1. The products, services, processes, technologies, materials, software, data, and other intellectual property created by and resulting from this Agreement ("Work Product") shall be owned by the Subrecipient.
 - 3.1.2. Subrecipient hereby grants Urban a paid up, non-exclusive, irrevocable, perpetual, worldwide royalty-free license to reproduce, publish, republish, summarize, excerpt or otherwise use, and license others to use in print or electronic form (in whole, or in part, including in connection with derivative works), including

in electronic databases or in any future form, the Work Product. Under the Prime Award, the Funder will have a license to any work developed as outlined in Appendix C.

3.2. **Publications:**

3.2.1 All publicity, publications, and notices produced or released concerning this Agreement shall acknowledge Urban and the Funder. Subrecipient and Urban will work together to define mutually agreeable credit language, in compliance with the conditions in Appendix C, which shall be agreed to in writing. Such credit must be included on each tangible Work Product of the Agreement. In order to support the broad dissemination and accessibility of the Work Product, Subrecipient agrees to coordinate with Urban prior to the release of any of its Work Product.

3.2.2 The Subrecipient agrees to furnish Urban's Technical Contact with copies of any news or press releases, articles, notices, and other Work Product within ten (10) days after such release, which shall be furnished to the Funder.

3.2.3 Neither party shall use the brand, logo, or marks of the other party without prior approval.

3.2.4 Notwithstanding the foregoing, all uses of any Funder name by Subrecipient in any manner shall be subject to approval of the Funder obtained through Urban, and must be in accordance with the conditions outlined in Appendix C.

4. **STOP WORK, TERMINATION AND DISPUTES**

4.1. **Stop Work:** Urban may at any time, by written order to the Subrecipient require the Subrecipient to stop all, or any part, of the work called for under this Agreement for a period up to ninety (90) days after the order is delivered to the Subrecipient. Upon receipt of the written order, the Subrecipient shall immediately comply with its terms and take all reasonable steps to minimize the incurrence of costs allocable to the work covered by the order during the period of work stoppage. Within a period of ninety (90) days after a stop work order is delivered to the Subrecipient

within any extension of that period to which the Parties shall have agreed, Urban shall either:

- cancel the stop-work order; or
- terminate the work covered by the order as provided in the Termination clause of this agreement.

4.2. **Termination:** This Agreement may be terminated, in whole or in part in the following situations:

- a) by Urban, if the Subrecipient materially fails to comply with terms and conditions of this Agreement.
- b) by Urban for cause.
- c) by mutual agreement of the Parties, in which case the two Parties shall agree upon the termination conditions, including the effective date, and, in the case of partial termination, the portion to be terminated.
- d) by Urban, if the Funder determines that continuation of all or part of the funding for this Agreement should be suspended or terminated.

Subrecipient shall cease to incur further costs upon notification of termination by Urban.

4.3. **Disputes, Claims and Appeals:** Urban and Subrecipient shall work together in good faith to resolve any dispute arising under this Agreement. Any dispute or difference arising out of, or in connection with this Agreement or the breach thereof which cannot be amicably settled by mutual consent between the Parties shall be submitted to mediation in a mutually agreed upon location. If the dispute is not resolved through mediation, either party may pursue any remedies available at law or in equity in a court of competent jurisdiction, consistent with applicable law.

5. RECORD RETENTION AND FILE MANAGEMENT

5.1. **Accounting Standards:** Subrecipient will maintain books, accounts, and records that, with sufficient detail, accurately and clearly reflect its transactions and disposition of Agreement funds. Subrecipient agrees to maintain substantiating records for all expenditures and make books and records available to Urban at reasonable times, if requested.

5.2. **Record Retention:** Subrecipient shall retain all records related to this Agreement for at least three (3) years after expiration of the Agreement term.

5.3. **Audit:** At Urban's expense, upon reasonable notice, Urban may audit Agreement-related books and records, and Subrecipient shall provide all necessary assistance in connection therewith, which shall also be in accordance with Appendix C.

Urban may, at its expense, monitor and conduct an evaluation of operations under the Agreement, which may include meetings or visits by representatives of Urban to observe and discuss the Subrecipient's program, procedures and operations.

6. MISCELLANEOUS

- 6.1. **Insurance:** Subrecipient shall maintain at its own expense adequate insurance as is reasonable and customary for similar organizations in any and all forms necessary to protect against all liabilities, losses, damages, claims, settlements, expenses, and legal fees arising out or resulting from performance of this Agreement.

Subrecipient shall ensure that approved subrecipients or subcontractors obtain and maintain appropriate insurance against liability for injury to persons or damage to property arising from activities relating to the Agreement.

- 6.2. **Incorporation of the Mandatory Prime Award Provisions:** Applicable provisions of the Prime Award agreement are incorporated herein by reference in Appendix C (Mandatory Prime Award Provisions). Subrecipient assumes all provisions and obligations outlined in Appendix C.

- 6.3. **Representations.** Subrecipient represents it has the power and authority to enter into and perform this Agreement; that Subrecipient's assigned technical, management and key personnel are completely qualified, professionally competent, and duly licensed to perform the services; and all services and deliverables delivered to be free from defects and in compliance with Agreement specifications. Moreover, Subrecipient represents and warrants that all materials created in performing the services and providing the deliverables shall be original Work Product, work for which it has secured the perpetual and irrevocable right to use in the manner so used by Subrecipient, or work which is in the public domain, and which does not violate any copyright, patent or other intellectual property rights, including trade secrets. The above representations and warranties constitute conditions shall extend to Urban's Funder.

- 6.4. **Assignment/Subawards:** Unless detailed in the approved Agreement Budget, Subrecipient shall not assign this Agreement nor any rights or obligations herein, nor subcontract or subgrant any funds under this Agreement without the prior written consent of Urban's Contractual Contact. This provision does not apply to the purchase of supplies,

material, equipment or general support services.

- 6.5. **Severability:** If any term or other provision of this Agreement is determined to be unenforced, void, or contrary to law by a competent authority all other terms and provisions shall remain in full force and effect. In the event a term or provision is unenforceable, it will be modified to the extent necessary for enforcement or replaced by another provision to achieve the same result.
- 6.6. **Waiver:** Waiver of any provision herein shall not be deemed a waiver of any other provision herein, nor shall waiver of any breach be construed as continuing waiver of other breaches of the same or other provisions of the Agreement.
- 6.7. **Order of Precedence:** Any inconsistency or conflict in the terms and conditions specified in this Agreement shall be resolved according to the following order of precedence:
- a) Part I - Schedule
 - b) Part II - General Terms and Conditions
 - c) Part III - Appendices in the following order of precedence:
 - 1. Appendix C – Mandatory Prime Award Provisions
 - 2. Appendix A – Program Description
 - 3. Appendix B – Budget

END OF GENERAL TERMS AND CONDITIONS

PART III – APPENDICES

APPENDIX A – PROGRAM DESCRIPTION

APPENDIX B – BUDGET

Name	Title	FTE or Hours	Annual salary or Hourly rate	Amount
Aaqilah Islam	Principal Analyst—Manager of Housing Justice System Initiatives	40.00	\$160,108	\$157,742
SALARY/WAGES SUBTOTAL				\$157,742
FRINGE BENEFITS				\$42,258
TOTAL				\$200,000

APPENDIX C – MANDATORY PRIME AWARD PROVISIONS

1. **USE OF FUNDS:** Your organization further confirms that it has and will exercise control over the process of selecting any secondary grantee, contractor, or consultant and that there does not exist an agreement, written or oral, under which Urban or the Funder has caused or may cause the selection of a secondary grantee, contractor, or consultant.
2. **RESTRICTIONS ON USE OF FUNDS:**
 - 2.1 In connection with the activities to be funded under this Agreement, your organization acknowledges that it is responsible for complying with all relevant laws and regulations of the countries in which such activities are conducted.
 - 2.2 Your organization hereby confirms that Agreement funds will not be used for any of the following purposes:
 - a) To carry on propaganda, to lobby or otherwise attempt to influence legislation (within the meaning of Section 4945(d)(1) of the United States Internal Revenue Code (“Tax Code”));
 - b) To influence the outcome of any specific public election or to carry on, directly or indirectly, any voter registration drive (within the meaning of Section 4945(d)(2) of the Tax Code);
 - c) To undertake any activity for any purpose other than one specified in Section 170(c)(2)(B) of the Tax Code;
 - d) To offer or provide money, gifts, or any other things of value, directly or indirectly, to anyone in order to improperly influence any act or decision relating to the Funder or the project, including by assisting any party to secure an improper advantage in violation of the Foreign Corrupt Practices Act or similar laws of the countries in which the grantee operates;
 - e) To use directly or indirectly to assist in, sponsor, or provide support for acts of terrorism or to support organizations or persons listed as terrorists on lists maintained by the United States government, the United Nations, the European Union, and other entities (each, a “Prohibited Party”); or
 - f) To use in or with respect to countries or individuals under sanctions by the U.S. government, including prohibited travel to and from those countries, or for the unauthorized provision of funds or services to any person, entity, or organization from those countries.
 - 2.3 Attachment 1 and Attachment 2 to Appendix C are summaries of the types of activities prohibited under Section 4945 of the Tax Code.
 - 2.4 Further, your organization agrees to provide such information as either may reasonably request, including:

- a) information about persons or organizations that will or have received funds in connection with this Agreement and
- b) information regarding the steps and procedures that your organization uses to ensure that grant funds are not used to pay a Prohibited Party either through regranteeing or by contract.

3. INTELLECTUAL PROPERTY:

3.1 In signing this Agreement, your organization acknowledges that it has read the Funder's Policy Regarding Intellectual Property Arising Out of Foundation Grants (the "Policy"; Attachment 3 to Appendix C). Except as may otherwise be provided herein, all copyright interest in materials produced as a result of this Agreement (Work Product, as defined in the General Terms and Conditions) shall be made available consistent with the terms of the Policy. To effect the widest possible distribution of the Work Product and to ensure that it furthers charitable purposes and benefits the public, the Funder shall have a non-exclusive, transferable, perpetual, irrevocable, royalty-free, paid-up, worldwide license to use, display, perform, reproduce, publish, copy, and distribute, for non-commercial purposes, any work product arising out of or resulting from your organization's use (including digital, electronic or other media) of these funds, including all intellectual property rights appurtenant thereto, and to sublicense to third parties the rights described herein. Without limiting the foregoing, such license includes the right of the Funder to publish the any work produced, including Subrecipient Work Product, on the Funder's website in connection with the Funder's work with and support of your organization, and for use in periodic public reports, press releases, and fact sheets about the Funder's grantmaking. Your organization further acknowledges and agrees to ensure Urban is provided all rights to execute any additional documents necessary to effect such license.

3.2 To the extent that, as part of any arrangement with any subcontractor, subgrantee, or other party working on matters related to this Agreement and receiving the benefit of the Agreement funds (a "Third Party"), the intellectual property rights in Subrecipient Work Product is to be owned by such Third Party, your organization agrees to require that Urban shall have all rights to ensure the Funder be granted a license to any work produced under this Prime Award as outlined in this section.

4. USE OF NAME: Your organization acknowledges that the name and mark "John D. and Catherine T. MacArthur Foundation" and all variations thereof and any other names and marks comprising the name or mark "MacArthur" (the "MacArthur Name"), are the sole and exclusive property of the Funder, that any and all uses of the MacArthur Name by your organization shall inure solely to the benefit of the Funder, and that your organization shall not acquire any right, title or interest in any MacArthur Name. All uses of any MacArthur Name by your organization in any manner shall be subject to inspection by and approval of the Funder through

Urban, which approval may be granted or withheld in the sole and absolute discretion of the Funder. Upon termination of this agreement, or at the request of Urban or the Funder at any time, your organization shall immediately discontinue and forever thereafter desist from any and all use of any MacArthur Name and shall either destroy or deliver to the Funder, via Urban, at no charge to the Funder or Urban, stationery, brochures, proposed paid media and other similar materials bearing any MacArthur Name that then are in the possession or control of your organization.

5. WORKPLACE CONDUCT STANDARDS:

5.1 Your organization represents that it aspires to a tolerant and civil workplace, one that is free of discrimination, harassment, and misconduct of any kind. Your organization further represents that it has in place or is committed to putting in place policies, procedures, or practices that will help ensure a tolerant and civil workplace, including the following: Staff training regarding workplace misconduct; mechanisms for complaints to be made to an impartial person; fair processes for investigation and adjudication; and prohibitions against retaliation against persons making good faith complaints.

5.2 In the event Urban or its Funder learns of allegations of workplace misconduct as a result of notification by your organization or by third parties, your organization agrees to cooperate with reasonable requests to understand the policies, procedures, and practices in place and what steps were taken in response to the allegations. In making such requests, Urban and/or the Funder is not seeking to determine the truth or falsity of the underlying allegations and is not accepting any such allegations as true. If Urban and/or the Funder concludes that your organization lacks the necessary workplace protections or has failed to adhere to appropriate practices in its investigation, Urban may take such action as is appropriate under the circumstances, and/or as recommended by its Funder, including suspending future Agreement payments until your organization has implemented additional steps to addressing the situation or, in extreme cases, terminating the Agreement. Prior to taking any action, Urban will discuss with your organization the proposed course of action and provide an opportunity to respond and suggest corrective action.

6. EVALUATING OPERATIONS: The Funder and Urban may monitor and conduct an evaluation of operations under this Agreement, which may include a visit from personnel to observe your organization's program, discuss the project with your organization's personnel, and review financial and other records and materials connected with the activities financed by this Agreement. Such visits shall be scheduled in advance for times mutually acceptable to your organization, the Funder, and Urban during normal business hours.

7. FUNDER GRANT REPORTS: The Funder may include basic information about this Agreement through a variety of public channels, including press releases, publications, videos, social media, and the Funder's website. If there are special considerations concerning the public announcement of this Agreement at your organization, if you plan to issue a public announcement of the Agreement, or if you would like to coordinate a public announcement of the Agreement, please reach out to Urban's Technical Contact prior to any such action.



DEPARTMENT OF
HOMELESSNESS AND
SUPPORTIVE HOUSING

Accept and Expend: Just Home Continuation Funds

Budget and Finance Committee | September 17, 2025



Accept and Expend Resolution

Resolution authorizes HSH to retroactively:

- Execute a **subgrant agreement** with The Urban Institute to support continued project management of the Just Home Program for costs incurred June 15 ,2025 through September 30, 2026.
- Accept and expend **\$200,000** in **Just Home Cohort 1 Continuation Funds**.

Just Home Program

- **MacArthur Foundation** and **The Urban Institute** launched the Just Home Project in 2022.
- **Just Home** is a national program designed to advance community-driven efforts to break the links between **housing instability** and **incarceration**.
- San Francisco is one of the four communities participating with HSH as the City's lead agency.
- Through the Just Home program, HSH has supported the collective development of a more **comprehensive, equitable and coordinated system** to bridge siloes between **homelessness, housing** and **criminal justice systems**.

Just Home Milestone: TAY Transitional Housing Program

- Innovative new transitional housing program in District 10 will serve up to **19 justice-involved young adults**.
- **3rd Street Youth Center & Clinic** will operate the site, expected to open this winter.
- **Onsite services** will provide intensive case management, individual health and wellness resources, financial assistance and workforce development.
- **Public-private partnership:** HSH, MOHCD, Housing Accelerator Fund, MacArthur Foundation and 3rd Street.



DEPARTMENT OF
HOMELESSNESS AND
SUPPORTIVE HOUSING

Questions?



Shireen McSpadden, Executive Director

Daniel Lurie, Mayor

Just Home Cohort 1 Continuation Funds	
City and County of San Francisco	
Prime Award No. 23-2308-157954-CJ	
Sources:	Grant Funds:
Private Grant: MacArthur Foundation	\$200,000
Total Sources:	<u>\$200,000</u>
Uses:	
Salary and Wages	\$157,742
Fringe Benefits	\$42,458
Total Uses:	<u>\$200,000</u>

From: Fernandez, Emma <EFernandez@urban.org>
Sent: Friday, March 14, 2025 3:41 PM
To: Everroad, Jocelyn (HOM); Islam, Aaqilah (HOM); Qiang, Ashley (HOM)
Cc: Walsh, Kelly; Pitkin, William; Lore Joplin
Subject: Just Home Continuation funding
Attachments: Just Home Continuation award submission guidelines.pdf; Just Home Subaward Information Sheet.xlsx; Just Home Continuation Award Budget Template.xlsx

This message is from outside the City email system. Do not open links or attachments from untrusted sources.

Hi Jocelyn, Aaqilah, and Ashley,

I'm writing to let you know that the San Francisco Just Home team is eligible to request up to \$200,000 in continuation funds to further support your Just Home implementation. Continuation funds may be used for continued program management, continued community engagement, or evaluation of program performance metrics. Urban and MacArthur may consider additional proposed uses for these funds (i.e. direct supportive services or other implementation activities) based on site proposals.

Site proposals for use of continuation funds must justify the proposed use and make a direct link between the site goals for the program and the proposed use of funding, with the budget and budget narrative supporting your proposed scope. Just Home *continuation funds will be provided through a separate subgrant agreement to your organization*. The submitted scope of work, budget, and budget narrative must clearly demonstrate how the proposed use of funding *is separate and distinct* from the funding and corresponding activities under the site's original Just Home subgrant. Subsequently, sites must track funds and invoice separately for costs incurred under each subgrant agreement. Continuation funds are available for a period of performance beginning no earlier than 5/1/2025 and continuing no later than 10/31/2026.

To submit a request for continuation award funding, send the following materials to efernandez@urban.org by April 11, 2025

1. Subaward Information Sheet
2. Proposed scope of work
3. Proposed budget, using attached budget template
4. Budget narrative

Please see attached document for more information.

Thank you,
Emma

Emma Fernandez
Policy Program Associate
Pronouns: she/her

U R B A N I N S T I T U T E

Research to Action Lab

www.urban.org



JUST HOME SAN FRANCISCO

Budget Narrative For Continuation Funds

The San Francisco Department of Homelessness and Supportive Housing (HSH) is the lead agency for Just Home and is requesting \$200,000 for continued program management. Resources will be used to ensure successful implementation of the site's planned project goals. Program management plays an essential role in sustaining local partnerships, implementing project components and managing shared resources across multiple city departments and organizations.

The Manager of Housing and Justice System Initiatives will ensure full implementation of Just Home, including the Program Related Investment (PRI) housing project, data integration and evaluation, and systems change work facilitated by the project. The program manager will also be responsible for continuing to build key relationships with justice system stakeholders to break down bureaucratic silos and foster a culture of collaboration. This involves planning, implementing and managing the project's goals and sustaining partnerships with individuals from impacted populations who have lived experience. HSH hired a new employee for this position in March 2023 and current project components are expected to be completed by Fall 2026.





JUST HOME—SAN FRANCISCO

Request for Continuation Funds (Proposed Scope of Work)

Subgrant Period of Performance: June 1, 2025 – October 31, 2026

Just Home in San Francisco is led by the Department of Homelessness and Supportive Housing (HSH). The project thrives on collaboration, and we recognize the importance of involving stakeholders in planning, implementation and sustainability efforts, ensuring they are an integral part of our site's commitment to achieve its two primary goals: 1) safely reduce the jail population/jail use in San Francisco and, 2) reduce disparities and other inequities in San Francisco's Homelessness Response and Criminal Legal Systems. Local partnerships include the following city agencies, departments and organizations:

Housing Partners: Mayor's Office of Housing and Community Development (MOHCD), San Francisco Housing Accelerator Fund (SFHAF), and 3rd Street Youth Center and Clinic.

Criminal Legal System Partners and Safety and Justice Challenge (SJC) Workgroup Members: Sheriff's Office (SFSO); Public Defender's Office (PDR); Adult Probation Department (APD); Jail Health at the Department of Public Health (DPH) and San Francisco Pretrial Diversion.

Community Engagement: Talent Poole.

Evaluation Partners for the Program Related Investment (PRI) Housing Project: California Policy Lab (CPL).

The primary objective of maintaining these ongoing partnerships is to ensure that individuals who have experienced homelessness in San Francisco and have been involved with the criminal legal system receive the necessary support to stabilize their housing options. San Francisco's Just Home investment (Subgrant #102418-0001-SFHSH-01) is presently dedicated to establishing sustainable and coordinated strategies aimed at reducing the local jail population while promoting tailored solutions for individuals disproportionately impacted by both the homelessness and criminal legal systems. A central component of this initiative is a two-pronged approach that encompasses systems change efforts and the development of a small-scale housing project. This housing project is specifically designed to provide housing and tailored services for transitional aged youth (TAY), ages 18 to 26, who frequently interact with multiple systems and experience housing instability upon release from custody. By fostering collaboration among the homelessness, health/behavioral health, and criminal legal systems, the project aims to create prevention and intervention pilots informed by community-driven program design recommendations, as well as actionable data and insights gathered through peer learning opportunities with other sites.



Additionally, we are designing a comprehensive data integration and evaluation plan that will inform our decision-making and support a model of sustained partnership between individuals with firsthand experience and/or expertise related to homelessness and/or criminal legal involvement, along with multiple city departments, agencies, and organizations. This evaluation plan is also intended to help local stakeholders understand how the strategies they choose may relate to the broader context of housing justice. We define housing justice as encompassing the contextual factors (e.g., community engagement, housing navigation and use, housing stabilization strategies, policy development, and capacity building) that need attention in addressing the structural drivers of homelessness. Our site's framework for housing justice includes several essential components:

1. Strategic objectives focused on systems change and developing tailored housing solutions
2. Data measurement and evaluation
3. Community engagement infrastructure
4. Cross-system partnerships, Knowledge exchange and Capacity building efforts

PROPOSED SCOPE OF WORK FOR CONTINUATION FUNDS

The planning phase of this project began with the recognition of the underlying contextual factors necessary for successfully implementing a housing demonstration project. This focus on promoting cross-system collaboration and driving systems change provided the rationale and local support needed to build the infrastructure required for developing a Housing Investment Action Plan (HIAP), committed to the resources necessary for its implementation and sustainability.

Our request for continuation funds centers on ensuring the successful implementation of our site's planned project goals, including our comprehensive evaluation efforts. Project management plays an essential role in sustaining local partnerships, implementing project components, and managing shared resources across multiple city departments and organizations. Key areas of focus include:

- Managing various innovations, including innovative decision-making to improve services for the housing site based on data insights. Innovation also involves facilitating information sharing through increased interactions across systems and developing policies to support sustained stakeholder participation in project decision-making.
- Establishing collaborative processes that are vital for developing tailored housing and service-related solutions for individuals involved with the criminal legal system. This work requires ongoing improvements in identifying, managing and effectively maximizing shared resources.



- Ensuring the quality and accuracy of the project by aligning cross-system efforts with departmental priorities and adhering to best practices at both local and national levels



Name of Applicant Community:

Name of Lead Applicant Organization: San Francisco Department of Homelessness and Supportive Housing

Name of Application Point of Contact: Aaqilah Islam

Name	Title	FTE or Hours	Annual salary or Hourly rate	Amount
Aaqilah Islam	Principal Analyst—Manager of Housing Justice System Initiatives	40.00	\$160,108.00	\$157,742
SALARY/WAGES SUBTOTAL				\$157,742
FRINGE BENEFITS				\$ 42,258
SUBCONTRACTS/CONSULTANTS SUBTOTAL				\$
OTHER DIRECT COSTS SUBTOTAL				\$
INDIRECT COSTS				\$
TOTAL				\$200,000

THE URBAN INSTITUTE
Grants and Contracts Office

Please complete this form which contains required information so that Urban can issue an agree to your organization. Upon returning to Urban, **please include your Form W-9.**

SUBAWARD INFORMATION SHEET

Complete all fields below

San Francisco Department of
Legal Name of Entity: Homelessness and Supportive Housing
DBA (if applicable)
UEI Number: E42PRK5JAJ13
440 Turk Street
Address
Address 2
City, State, Zipcode San Francisco, CA 94102
Organized/incorporated in what state?
Entity Type (dropdown): State or Local Government Entity

If small business (SB), select type from dropdown:
If other, write entity type here:

Contact Information

CONTRACTUAL

Name Jocelyn Everroad
Title Manager of Planning & Strategy
Address 440 Turk Street
Address 2
City, State, Zipcode San Francisco CA, 94102
Phone 1 (628) 652-7707
Email jocelyn.everroad@sfgov.org

TECHNICAL

Name Aaqilah Islam
Manager of Housing and Justice System
Title Initiatives
Address 440 Turk Street
Address 2
City, State, Zipcode San Francisco, CA 94102
Phone Cell: 1 (415) 218-3520; P: (628) 652-7865
Email aaqilah.islam@sfgov.org

Does your organization have a fiscal
FISCAL SPONSOR sponsor?

Yes

No

If yes, list name and contact information of fiscal sponsor below. F

ment

☐
☒

Please also list the state of incorporation.

**Request for Taxpayer
Identification Number and Certification**

Go to www.irs.gov/FormW9 for instructions and the latest information.

**Give form to the
requester. Do not
send to the IRS.**

Before you begin. For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

Print or type. See Specific Instructions on page 3.	1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.) City and County of San Francisco, Department of Homelessness and Supportive Housing	
	2 Business name/disregarded entity name, if different from above.	
	3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only one of the following seven boxes. ☐ Individual/sole proprietor ☐ C corporation ☐ S corporation ☐ Partnership ☐ Trust/estate ☐ LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) _____ Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner. ☒ Other (see instructions) Local government entity	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) 3 Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) C (Applies to accounts maintained outside the United States.)
	3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions ☐	
	5 Address (number, street, and apt. or suite no.). See instructions. 440 Turk Street	Requester's name and address (optional)
6 City, state, and ZIP code San Francisco, CA 94102		
7 List account number(s) here (optional)		

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. See also *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number									
			-				-		
or									
Employer identification number									
9	4		-	6	0	0	0	4	1

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person <i>Dalisay Agustin</i> box SIGN 4LR9LRR2-4651JWWV
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Date **Apr 10, 2025**

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

What's New

Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.

New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they

must obtain your correct taxpayer identification number (TIN), which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid).
- Form 1099-DIV (dividends, including those from stocks or mutual funds).
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds).
- Form 1099-NEC (nonemployee compensation).
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers).
- Form 1099-S (proceeds from real estate transactions).
- Form 1099-K (merchant card and third-party network transactions).
- Form 1098 (home mortgage interest), 1098-E (student loan interest), and 1098-T (tuition).
- Form 1099-C (canceled debt).
- Form 1099-A (acquisition or abandonment of secured property).

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

Caution: If you don't return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See *What is backup withholding*, later.

By signing the filled-out form, you:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued);
2. Certify that you are not subject to backup withholding; or
3. Claim exemption from backup withholding if you are a U.S. exempt payee; and
4. Certify to your non-foreign status for purposes of withholding under chapter 3 or 4 of the Code (if applicable); and
5. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting is correct. See *What Is FATCA Reporting*, later, for further information.

Note: If you are a U.S. person and a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien;
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States;
- An estate (other than a foreign estate); or
- A domestic trust (as defined in Regulations section 301.7701-7).

Establishing U.S. status for purposes of chapter 3 and chapter 4 withholding. Payments made to foreign persons, including certain distributions, allocations of income, or transfers of sales proceeds, may be subject to withholding under chapter 3 or chapter 4 of the Code (sections 1441–1474). Under those rules, if a Form W-9 or other certification of non-foreign status has not been received, a withholding agent, transferee, or partnership (payor) generally applies presumption rules that may require the payor to withhold applicable tax from the recipient, owner, transferor, or partner (payee). See Pub. 515, *Withholding of Tax on Nonresident Aliens and Foreign Entities*.

The following persons must provide Form W-9 to the payor for purposes of establishing its non-foreign status.

- In the case of a disregarded entity with a U.S. owner, the U.S. owner of the disregarded entity and not the disregarded entity.
- In the case of a grantor trust with a U.S. grantor or other U.S. owner, generally, the U.S. grantor or other U.S. owner of the grantor trust and not the grantor trust.
- In the case of a U.S. trust (other than a grantor trust), the U.S. trust and not the beneficiaries of the trust.

See Pub. 515 for more information on providing a Form W-9 or a certification of non-foreign status to avoid withholding.

Foreign person. If you are a foreign person or the U.S. branch of a foreign bank that has elected to be treated as a U.S. person (under Regulations section 1.1441-1(b)(2)(iv) or other applicable section for chapter 3 or 4 purposes), do not use Form W-9. Instead, use the appropriate Form W-8 or Form 8233 (see Pub. 515). If you are a qualified foreign pension fund under Regulations section 1.897(l)-1(d), or a partnership that is wholly owned by qualified foreign pension funds, that is treated as a non-foreign person for purposes of section 1445 withholding, do not use Form W-9. Instead, use Form W-8EXP (or other certification of non-foreign status).

Nonresident alien who becomes a resident alien. Generally, only a nonresident alien individual may use the terms of a tax treaty to reduce or eliminate U.S. tax on certain types of income. However, most tax treaties contain a provision known as a saving clause. Exceptions specified in the saving clause may permit an exemption from tax to continue for certain types of income even after the payee has otherwise become a U.S. resident alien for tax purposes.

If you are a U.S. resident alien who is relying on an exception contained in the saving clause of a tax treaty to claim an exemption from U.S. tax on certain types of income, you must attach a statement to Form W-9 that specifies the following five items.

1. The treaty country. Generally, this must be the same treaty under which you claimed exemption from tax as a nonresident alien.
2. The treaty article addressing the income.
3. The article number (or location) in the tax treaty that contains the saving clause and its exceptions.
4. The type and amount of income that qualifies for the exemption from tax.
5. Sufficient facts to justify the exemption from tax under the terms of the treaty article.

Example. Article 20 of the U.S.-China income tax treaty allows an exemption from tax for scholarship income received by a Chinese student temporarily present in the United States. Under U.S. law, this student will become a resident alien for tax purposes if their stay in the United States exceeds 5 calendar years. However, paragraph 2 of the first Protocol to the U.S.-China treaty (dated April 30, 1984) allows the provisions of Article 20 to continue to apply even after the Chinese student becomes a resident alien of the United States. A Chinese student who qualifies for this exception (under paragraph 2 of the first Protocol) and is relying on this exception to claim an exemption from tax on their scholarship or fellowship income would attach to Form W-9 a statement that includes the information described above to support that exemption.

If you are a nonresident alien or a foreign entity, give the requester the appropriate completed Form W-8 or Form 8233.

Backup Withholding

What is backup withholding? Persons making certain payments to you must under certain conditions withhold and pay to the IRS 24% of such payments. This is called “backup withholding.” Payments that may be subject to backup withholding include, but are not limited to, interest, tax-exempt interest, dividends, broker and barter exchange transactions, rents, royalties, nonemployee pay, payments made in settlement of payment card and third-party network transactions, and certain payments from fishing boat operators. Real estate transactions are not subject to backup withholding.

You will not be subject to backup withholding on payments you receive if you give the requester your correct TIN, make the proper certifications, and report all your taxable interest and dividends on your tax return.

Payments you receive will be subject to backup withholding if:

1. You do not furnish your TIN to the requester;
2. You do not certify your TIN when required (see the instructions for Part II for details);
3. The IRS tells the requester that you furnished an incorrect TIN;
4. The IRS tells you that you are subject to backup withholding because you did not report all your interest and dividends on your tax return (for reportable interest and dividends only); or
5. You do not certify to the requester that you are not subject to backup withholding, as described in item 4 under “*By signing the filled-out form*” above (for reportable interest and dividend accounts opened after 1983 only).

Certain payees and payments are exempt from backup withholding. See *Exempt payee code*, later, and the separate Instructions for the Requester of Form W-9 for more information.

See also *Establishing U.S. status for purposes of chapter 3 and chapter 4 withholding*, earlier.

What Is FATCA Reporting?

The Foreign Account Tax Compliance Act (FATCA) requires a participating foreign financial institution to report all U.S. account holders that are specified U.S. persons. Certain payees are exempt from FATCA reporting. See *Exemption from FATCA reporting code*, later, and the Instructions for the Requester of Form W-9 for more information.

Updating Your Information

You must provide updated information to any person to whom you claimed to be an exempt payee if you are no longer an exempt payee and anticipate receiving reportable payments in the future from this person. For example, you may need to provide updated information if you are a C corporation that elects to be an S corporation, or if you are no longer tax exempt. In addition, you must furnish a new Form W-9 if the name or TIN changes for the account, for example, if the grantor of a grantor trust dies.

Penalties

Failure to furnish TIN. If you fail to furnish your correct TIN to a requester, you are subject to a penalty of \$50 for each such failure unless your failure is due to reasonable cause and not to willful neglect.

Civil penalty for false information with respect to withholding. If you make a false statement with no reasonable basis that results in no backup withholding, you are subject to a \$500 penalty.

Criminal penalty for falsifying information. Willfully falsifying certifications or affirmations may subject you to criminal penalties including fines and/or imprisonment.

Misuse of TINs. If the requester discloses or uses TINs in violation of federal law, the requester may be subject to civil and criminal penalties.

Specific Instructions

Line 1

You must enter one of the following on this line; **do not** leave this line blank. The name should match the name on your tax return.

If this Form W-9 is for a joint account (other than an account maintained by a foreign financial institution (FFI)), list first, and then circle, the name of the person or entity whose number you entered in Part I of Form W-9. If you are providing Form W-9 to an FFI to document a joint account, each holder of the account that is a U.S. person must provide a Form W-9.

• **Individual.** Generally, enter the name shown on your tax return. If you have changed your last name without informing the Social Security Administration (SSA) of the name change, enter your first name, the last name as shown on your social security card, and your new last name.

Note for ITIN applicant: Enter your individual name as it was entered on your Form W-7 application, line 1a. This should also be the same as the name you entered on the Form 1040 you filed with your application.

• **Sole proprietor.** Enter your individual name as shown on your Form 1040 on line 1. Enter your business, trade, or “doing business as” (DBA) name on line 2.

• **Partnership, C corporation, S corporation, or LLC, other than a disregarded entity.** Enter the entity’s name as shown on the entity’s tax return on line 1 and any business, trade, or DBA name on line 2.

• **Other entities.** Enter your name as shown on required U.S. federal tax documents on line 1. This name should match the name shown on the charter or other legal document creating the entity. Enter any business, trade, or DBA name on line 2.

• **Disregarded entity.** In general, a business entity that has a single owner, including an LLC, and is not a corporation, is disregarded as an entity separate from its owner (a disregarded entity). See Regulations section 301.7701-2(c)(2). A disregarded entity should check the appropriate box for the tax classification of its owner. Enter the owner’s name on line 1. The name of the owner entered on line 1 should never be a disregarded entity. The name on line 1 should be the name shown on the income tax return on which the income should be reported. For

example, if a foreign LLC that is treated as a disregarded entity for U.S. federal tax purposes has a single owner that is a U.S. person, the U.S. owner’s name is required to be provided on line 1. If the direct owner of the entity is also a disregarded entity, enter the first owner that is not disregarded for federal tax purposes. Enter the disregarded entity’s name on line 2. If the owner of the disregarded entity is a foreign person, the owner must complete an appropriate Form W-8 instead of a Form W-9. This is the case even if the foreign person has a U.S. TIN.

Line 2

If you have a business name, trade name, DBA name, or disregarded entity name, enter it on line 2.

Line 3a

Check the appropriate box on line 3a for the U.S. federal tax classification of the person whose name is entered on line 1. Check only one box on line 3a.

IF the entity/individual on line 1 is a(n) . . .	THEN check the box for . . .
• Corporation	Corporation.
• Individual or	Individual/sole proprietor.
• Sole proprietorship	
• LLC classified as a partnership for U.S. federal tax purposes or	Limited liability company and enter the appropriate tax classification:
• LLC that has filed Form 8832 or 2553 electing to be taxed as a corporation	P = Partnership, C = C corporation, or S = S corporation.
• Partnership	Partnership.
• Trust/estate	Trust/estate.

Line 3b

Check this box if you are a partnership (including an LLC classified as a partnership for U.S. federal tax purposes), trust, or estate that has any foreign partners, owners, or beneficiaries, and you are providing this form to a partnership, trust, or estate, in which you have an ownership interest. You must check the box on line 3b if you receive a Form W-8 (or documentary evidence) from any partner, owner, or beneficiary establishing foreign status or if you receive a Form W-9 from any partner, owner, or beneficiary that has checked the box on line 3b.

Note: A partnership that provides a Form W-9 and checks box 3b may be required to complete Schedules K-2 and K-3 (Form 1065). For more information, see the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

If you are required to complete line 3b but fail to do so, you may not receive the information necessary to file a correct information return with the IRS or furnish a correct payee statement to your partners or beneficiaries. See, for example, sections 6698, 6722, and 6724 for penalties that may apply.

Line 4 Exemptions

If you are exempt from backup withholding and/or FATCA reporting, enter in the appropriate space on line 4 any code(s) that may apply to you.

Exempt payee code.

- Generally, individuals (including sole proprietors) are not exempt from backup withholding.
- Except as provided below, corporations are exempt from backup withholding for certain payments, including interest and dividends.
- Corporations are not exempt from backup withholding for payments made in settlement of payment card or third-party network transactions.
- Corporations are not exempt from backup withholding with respect to attorneys’ fees or gross proceeds paid to attorneys, and corporations that provide medical or health care services are not exempt with respect to payments reportable on Form 1099-MISC.

The following codes identify payees that are exempt from backup withholding. Enter the appropriate code in the space on line 4.

1—An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2).

- 2—The United States or any of its agencies or instrumentalities.
- 3—A state, the District of Columbia, a U.S. commonwealth or territory, or any of their political subdivisions or instrumentalities.
- 4—A foreign government or any of its political subdivisions, agencies, or instrumentalities.
- 5—A corporation.
- 6—A dealer in securities or commodities required to register in the United States, the District of Columbia, or a U.S. commonwealth or territory.
- 7—A futures commission merchant registered with the Commodity Futures Trading Commission.
- 8—A real estate investment trust.
- 9—An entity registered at all times during the tax year under the Investment Company Act of 1940.
- 10—A common trust fund operated by a bank under section 584(a).
- 11—A financial institution as defined under section 581.
- 12—A middleman known in the investment community as a nominee or custodian.
- 13—A trust exempt from tax under section 664 or described in section 4947.

The following chart shows types of payments that may be exempt from backup withholding. The chart applies to the exempt payees listed above, 1 through 13.

IF the payment is for . . .	THEN the payment is exempt for . . .
• Interest and dividend payments	All exempt payees except for 7.
• Broker transactions	Exempt payees 1 through 4 and 6 through 11 and all C corporations. S corporations must not enter an exempt payee code because they are exempt only for sales of noncovered securities acquired prior to 2012.
• Barter exchange transactions and patronage dividends	Exempt payees 1 through 4.
• Payments over \$600 required to be reported and direct sales over \$5,000 ¹	Generally, exempt payees 1 through 5. ²
• Payments made in settlement of payment card or third-party network transactions	Exempt payees 1 through 4.

¹ See Form 1099-MISC, Miscellaneous Information, and its instructions.

² However, the following payments made to a corporation and reportable on Form 1099-MISC are not exempt from backup withholding: medical and health care payments, attorneys' fees, gross proceeds paid to an attorney reportable under section 6045(f), and payments for services paid by a federal executive agency.

Exemption from FATCA reporting code. The following codes identify payees that are exempt from reporting under FATCA. These codes apply to persons submitting this form for accounts maintained outside of the United States by certain foreign financial institutions. Therefore, if you are only submitting this form for an account you hold in the United States, you may leave this field blank. Consult with the person requesting this form if you are uncertain if the financial institution is subject to these requirements. A requester may indicate that a code is not required by providing you with a Form W-9 with "Not Applicable" (or any similar indication) entered on the line for a FATCA exemption code.

A—An organization exempt from tax under section 501(a) or any individual retirement plan as defined in section 7701(a)(37).

B—The United States or any of its agencies or instrumentalities.

C—A state, the District of Columbia, a U.S. commonwealth or territory, or any of their political subdivisions or instrumentalities.

D—A corporation the stock of which is regularly traded on one or more established securities markets, as described in Regulations section 1.1472-1(c)(1)(i).

E—A corporation that is a member of the same expanded affiliated group as a corporation described in Regulations section 1.1472-1(c)(1)(i).

F—A dealer in securities, commodities, or derivative financial instruments (including notional principal contracts, futures, forwards, and options) that is registered as such under the laws of the United States or any state.

G—A real estate investment trust.

H—A regulated investment company as defined in section 851 or an entity registered at all times during the tax year under the Investment Company Act of 1940.

I—A common trust fund as defined in section 584(a).

J—A bank as defined in section 581.

K—A broker.

L—A trust exempt from tax under section 664 or described in section 4947(a)(1).

M—A tax-exempt trust under a section 403(b) plan or section 457(g) plan.

Note: You may wish to consult with the financial institution requesting this form to determine whether the FATCA code and/or exempt payee code should be completed.

Line 5

Enter your address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns. If this address differs from the one the requester already has on file, enter "NEW" at the top. If a new address is provided, there is still a chance the old address will be used until the payor changes your address in their records.

Line 6

Enter your city, state, and ZIP code.

Part I. Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. If you are a resident alien and you do not have, and are not eligible to get, an SSN, your TIN is your IRS ITIN. Enter it in the entry space for the Social security number. If you do not have an ITIN, see *How to get a TIN* below.

If you are a sole proprietor and you have an EIN, you may enter either your SSN or EIN.

If you are a single-member LLC that is disregarded as an entity separate from its owner, enter the owner's SSN (or EIN, if the owner has one). If the LLC is classified as a corporation or partnership, enter the entity's EIN.

Note: See *What Name and Number To Give the Requester*, later, for further clarification of name and TIN combinations.

How to get a TIN. If you do not have a TIN, apply for one immediately. To apply for an SSN, get Form SS-5, Application for a Social Security Card, from your local SSA office or get this form online at www.SSA.gov. You may also get this form by calling 800-772-1213. Use Form W-7, Application for IRS Individual Taxpayer Identification Number, to apply for an ITIN, or Form SS-4, Application for Employer Identification Number, to apply for an EIN. You can apply for an EIN online by accessing the IRS website at www.irs.gov/EIN. Go to www.irs.gov/Forms to view, download, or print Form W-7 and/or Form SS-4. Or, you can go to www.irs.gov/OrderForms to place an order and have Form W-7 and/or Form SS-4 mailed to you within 15 business days.

If you are asked to complete Form W-9 but do not have a TIN, apply for a TIN and enter "Applied For" in the space for the TIN, sign and date the form, and give it to the requester. For interest and dividend payments, and certain payments made with respect to readily tradable instruments, you will generally have 60 days to get a TIN and give it to the requester before you are subject to backup withholding on payments. The 60-day rule does not apply to other types of payments. You will be subject to backup withholding on all such payments until you provide your TIN to the requester.

Note: Entering "Applied For" means that you have already applied for a TIN or that you intend to apply for one soon. See also *Establishing U.S. status for purposes of chapter 3 and chapter 4 withholding*, earlier, for when you may instead be subject to withholding under chapter 3 or 4 of the Code.

Caution: A disregarded U.S. entity that has a foreign owner must use the appropriate Form W-8.

Part II. Certification

To establish to the withholding agent that you are a U.S. person, or resident alien, sign Form W-9. You may be requested to sign by the withholding agent even if item 1, 4, or 5 below indicates otherwise.

For a joint account, only the person whose TIN is shown in Part I should sign (when required). In the case of a disregarded entity, the person identified on line 1 must sign. Exempt payees, see *Exempt payee code*, earlier.

Signature requirements. Complete the certification as indicated in items 1 through 5 below.

1. Interest, dividend, and barter exchange accounts opened before 1984 and broker accounts considered active during 1983. You must give your correct TIN, but you do not have to sign the certification.

2. Interest, dividend, broker, and barter exchange accounts opened after 1983 and broker accounts considered inactive during 1983. You must sign the certification or backup withholding will apply. If you are subject to backup withholding and you are merely providing your correct TIN to the requester, you must cross out item 2 in the certification before signing the form.

3. Real estate transactions. You must sign the certification. You may cross out item 2 of the certification.

4. Other payments. You must give your correct TIN, but you do not have to sign the certification unless you have been notified that you have previously given an incorrect TIN. "Other payments" include payments made in the course of the requester's trade or business for rents, royalties, goods (other than bills for merchandise), medical and health care services (including payments to corporations), payments to a nonemployee for services, payments made in settlement of payment card and third-party network transactions, payments to certain fishing boat crew members and fishermen, and gross proceeds paid to attorneys (including payments to corporations).

5. Mortgage interest paid by you, acquisition or abandonment of secured property, cancellation of debt, qualified tuition program payments (under section 529), ABLE accounts (under section 529A), IRA, Coverdell ESA, Archer MSA or HSA contributions or distributions, and pension distributions. You must give your correct TIN, but you do not have to sign the certification.

What Name and Number To Give the Requester

For this type of account:	Give name and SSN of:
1. Individual	The individual
2. Two or more individuals (joint account) other than an account maintained by an FFI	The actual owner of the account or, if combined funds, the first individual on the account ¹
3. Two or more U.S. persons (joint account maintained by an FFI)	Each holder of the account
4. Custodial account of a minor (Uniform Gift to Minors Act)	The minor ²
5. a. The usual revocable savings trust (grantor is also trustee)	The grantor-trustee ¹
b. So-called trust account that is not a legal or valid trust under state law	The actual owner ¹
6. Sole proprietorship or disregarded entity owned by an individual	The owner ³
7. Grantor trust filing under Optional Filing Method 1 (see Regulations section 1.671-4(b)(2)(i)(A))**	The grantor*

For this type of account:	Give name and EIN of:
8. Disregarded entity not owned by an individual	The owner
9. A valid trust, estate, or pension trust	Legal entity ⁴
10. Corporation or LLC electing corporate status on Form 8832 or Form 2553	The corporation
11. Association, club, religious, charitable, educational, or other tax-exempt organization	The organization
12. Partnership or multi-member LLC	The partnership
13. A broker or registered nominee	The broker or nominee
14. Account with the Department of Agriculture in the name of a public entity (such as a state or local government, school district, or prison) that receives agricultural program payments	The public entity
15. Grantor trust filing Form 1041 or under the Optional Filing Method 2, requiring Form 1099 (see Regulations section 1.671-4(b)(2)(i)(B))**	The trust

¹ List first and circle the name of the person whose number you furnish. If only one person on a joint account has an SSN, that person's number must be furnished.

² Circle the minor's name and furnish the minor's SSN.

³ You must show your individual name on line 1, and enter your business or DBA name, if any, on line 2. You may use either your SSN or EIN (if you have one), but the IRS encourages you to use your SSN.

⁴ List first and circle the name of the trust, estate, or pension trust. (Do not furnish the TIN of the personal representative or trustee unless the legal entity itself is not designated in the account title.)

* **Note:** The grantor must also provide a Form W-9 to the trustee of the trust.

** For more information on optional filing methods for grantor trusts, see the Instructions for Form 1041.

Note: If no name is circled when more than one name is listed, the number will be considered to be that of the first name listed.

Secure Your Tax Records From Identity Theft

Identity theft occurs when someone uses your personal information, such as your name, SSN, or other identifying information, without your permission to commit fraud or other crimes. An identity thief may use your SSN to get a job or may file a tax return using your SSN to receive a refund.

To reduce your risk:

- Protect your SSN,
- Ensure your employer is protecting your SSN, and
- Be careful when choosing a tax return preparer.

If your tax records are affected by identity theft and you receive a notice from the IRS, respond right away to the name and phone number printed on the IRS notice or letter.

If your tax records are not currently affected by identity theft but you think you are at risk due to a lost or stolen purse or wallet, questionable credit card activity, or a questionable credit report, contact the IRS Identity Theft Hotline at 800-908-4490 or submit Form 14039.

For more information, see Pub. 5027, Identity Theft Information for Taxpayers.

Victims of identity theft who are experiencing economic harm or a systemic problem, or are seeking help in resolving tax problems that have not been resolved through normal channels, may be eligible for Taxpayer Advocate Service (TAS) assistance. You can reach TAS by calling the TAS toll-free case intake line at 877-777-4778 or TTY/TDD 800-829-4059.

Protect yourself from suspicious emails or phishing schemes.

Phishing is the creation and use of email and websites designed to mimic legitimate business emails and websites. The most common act is sending an email to a user falsely claiming to be an established legitimate enterprise in an attempt to scam the user into surrendering private information that will be used for identity theft.

The IRS does not initiate contacts with taxpayers via emails. Also, the IRS does not request personal detailed information through email or ask taxpayers for the PIN numbers, passwords, or similar secret access information for their credit card, bank, or other financial accounts.

If you receive an unsolicited email claiming to be from the IRS, forward this message to phishing@irs.gov. You may also report misuse of the IRS name, logo, or other IRS property to the Treasury Inspector General for Tax Administration (TIGTA) at 800-366-4484. You can forward suspicious emails to the Federal Trade Commission at spam@uce.gov or report them at www.ftc.gov/complaint. You can contact the FTC at www.ftc.gov/idtheft or 877-IDTHEFT (877-438-4338). If you have been the victim of identity theft, see www.IdentityTheft.gov and Pub. 5027.

Go to www.irs.gov/IdentityTheft to learn more about identity theft and how to reduce your risk.

Privacy Act Notice

Section 6109 of the Internal Revenue Code requires you to provide your correct TIN to persons (including federal agencies) who are required to file information returns with the IRS to report interest, dividends, or certain other income paid to you; mortgage interest you paid; the acquisition or abandonment of secured property; the cancellation of debt; or contributions you made to an IRA, Archer MSA, or HSA. The person collecting this form uses the information on the form to file information returns with the IRS, reporting the above information. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation and to cities, states, the District of Columbia, and U.S. commonwealths and territories for use in administering their laws. The information may also be disclosed to other countries under a treaty, to federal and state agencies to enforce civil and criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism. You must provide your TIN whether or not you are required to file a tax return. Under section 3406, payors must generally withhold a percentage of taxable interest, dividends, and certain other payments to a payee who does not give a TIN to the payor. Certain penalties may also apply for providing false or fraudulent information.

From: VanDyke, Brianne <BVanDyke@urban.org>
Sent: Tuesday, July 15, 2025 12:54 PM
To: Everroad, Jocelyn (HOM); Islam, Aaqilah (HOM)
Cc: Fernandez, Emma; Walsh, Kelly; Dahl, Allison; LabOps
Subject: FOR SIGNATURE: 103096-0001-SFHSH-01 | Urban Institute Continuation Award
Attachments: 103096-0001-SFHSH-01.pdf

This message is from outside the City email system. Do not open links or attachments from untrusted sources.

Good afternoon,

Please find attached **Subgrant No. 103096-0001-SFHSH-01** for the San Francisco Department of Homelessness and Supportive Housing's continued participation in the Urban Institute's Just Home initiative. I kindly request that you review the agreement and return a signed PDF copy to me via email. Should you need to propose any changes, please let me know; I will provide a Word version to facilitate that process. Based on your previous indication that the Dept cannot agree to governing law outside of California as a state agency (during negotiations for 102418-0001-SFHSH-01), we have remained silent on that term.

In addition to reviewing and signing the agreement, please respond to this email with a brief description of the costs covered by the fringe benefits line in your budget (\$42,258).

Thank you and we look forward to hearing from you!

Best,
Brianne

Brianne VanDyke, CAPM
Subcontracts Administrator, Grants & Contracts Department
Pronouns: she/her
Phone: (202) 261-5334

U R B A N I N S T I T U T E
500 L'Enfant Plaza SW, Washington, DC 20024
www.urban.org



To: Honorable Members of the San Francisco Board of Supervisors

From: San Francisco Department of Homelessness and Supportive Housing

Date: August 7, 2025

Subject: Just Home Cohort I Continuation Funds Subgrant Agreement and Accept Expend Legislation - Retroactive Request

This Resolution seeks approval for the Department of Homelessness and Supportive Housing ("HSH") to enter into a subgrant agreement with The Urban Institute ("Urban Institute") for a term of June 15, 2025, through September 30, 2026, in an amount not to exceed \$200,000 for continued project management of the Just Home Program in San Francisco.

HSH, as the lead agency for San Francisco's Just Home Program, has worked to build relationships and active partnerships with San Francisco's criminal justice agencies and system partners to support the collective development of a more comprehensive, equitable and coordinated system to bridge significant siloes between the homelessness, housing, and criminal justice systems. The Continuation Funds will support HSH's Manager of Housing and Justice Systems Initiatives to ensure full implement of the Just Home Program, including Program Related Investment ("PRI") housing project, data integration and evaluation, and systems change work facilitated by the project.

A request for retroactive approval is being sought because the effective date of the Subgrant Agreement is June 15, 2025, and HSH received the Award Notice from Urban Institute on July 15, 2025. This Resolution would approve HSH to retroactively accept and expend funds for eligible expenses incurred as of the Subgrant Agreement start date of June 15, 2025.

The grant expenditure start date is the only component of this legislation that is retroactive. HSH will not enter into the Subgrant Agreement with Urban Institute until authorization is received from the Board of Supervisors through this Resolution.

If you have questions about this grant or the retroactive request for approval, please contact Dylan Schneider, HSH Manager of Legislative Affairs, at dylan.schneider@sfgov.org.



TO: Angela Calvillo, Clerk of the Board of Supervisors

FROM: Dylan Schneider, HSH Manager of Legislative Affairs

DATE: August 13, 2025

SUBJECT: Retroactive Accept and Expend Resolution for Just Home Cohort 1 Continuation Funds

GRANT TITLE: Just Home Cohort 1 Continuation Funds - \$200,000

Attached please find each of the following:

- ☒ Proposed grant resolution approved by Department, Mayor, Controller (Doc 2)
- ☒ Grant information form, including disability checklist (Doc 3)
- ☒ Grant budget (Doc 4)
- ☒ Grant application (Doc 5)
- ☒ Grant award letter from funding agency (Doc 6)
- ☐ Ethics Form 126 (if applicable)
- ☒ Contracts, Leases/Agreements (if applicable): Grant Agreement (Doc 7)
- ☒ Other (Explain):
 - Notification of eligibility (Doc 8)
 - HSH Retroactive Memo (Doc 9)

Special Timeline Requirements:

Respectfully request scheduling at earliest convenience.

Departmental representative to receive a copy of the adopted resolution:

Name: Dylan Schneider

Phone: 628.652.7742

Interoffice Mail Address: 440 Turk Street, San Francisco, CA 94102

Certified copy required Yes ☐

No ☒

(Note: certified copies have the seal of the City/County affixed and are occasionally required by funding agencies. In most cases ordinary copies without the seal are sufficient).

OFFICE OF THE MAYOR
SAN FRANCISCO



DANIEL LURIE
MAYOR

TO: Angela Calvillo, Clerk of the Board of Supervisors
FROM: Adam Thongsavat, Liaison to the Board of Supervisors
RE: Execute Subgrant Agreement and Accept and Expend Grant – Retroactive – Urban Institute –
Just Home Cohort 1 Continuation Funds - \$200,000
DATE: September 2, 2025

Resolution authorizing the Department of Homelessness and Supportive Housing ("HSH") to execute a Subgrant Agreement with The Urban Institute for a total amount not to exceed \$200,000 of Just Home Cohort 1 Continuation Funds; to retroactively accept and expend those grant funds to support continued project management of the Just Home Program for costs incurred June 15, 2025, through September 30, 2026; and authorizing HSH to enter into any additions, amendments, or other modifications to the Subgrant Agreement that do not materially increase the obligations or liabilities of the City or materially decrease the benefits to the City.

Should you have any questions, please contact Adam Thongsavat at adam.thongsavat@sfgov.org