

**APPENDIX A - SERVICES TO BE PROVIDED BY
 EVICTION DEFENSE COLLABORATIVE
 HOUSING SUBSIDIES**

Effective July 1, 2024 through June 30, 2028

I. Purpose of Grant

Older adults and adults with disabilities face an ongoing struggle to maintain stable housing in San Francisco due to increasing rents and a limited supply of safe, affordable housing. This grant prevents homelessness and promotes housing stabilization by providing housing subsidies for older adults and adults with disabilities in unstable housing situations.

II. Definitions

Adult with a Disability	A person 18 to 59 years of age living with a disability
AMI	Area Median Income for the area containing San Francisco is a figure established by the United States Department of Housing and Urban Development on an annual basis. The City of San Francisco publishes an AMI chart each year which can be located here: https://www.sf.gov/find-your-area-median-income-ami-level
At Risk of Institutionalization	To be considered at risk of institutionalization, a person must have, at a minimum, one of the following: 1) functional impairment in a minimum of two Activities of Daily Living (ADL): eating, dressing, transferring, bathing, toileting, and grooming; or 2) a medical condition to the extent requiring the level of care that would be provided in a nursing facility; or 3) be unable to manage his/her own affairs due to emotional and/or cognitive impairment, evidenced by functional impairment in a minimum of three Instrumental Activities of Daily Living (IADLs): preparing meals, managing money, shopping for groceries or personal items, performing housework, using a telephone.
CARBON	Contracts Administration, Reporting and Billing Online System.
City	City and County of San Francisco
Communities of Color	An inclusive term and unifying term for persons who do not identify as White, who have been historically and systemically disadvantaged by institutionalized and interpersonal racism
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
Grantee	Eviction Defense Collaborative

HUD	Department of Housing and Urban Development
LGBTQ+	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their sex assigned at birth. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender nonbinary.
Limited English-speaking Proficiency	Any person who does not speak English well or is otherwise unable to communicate effectively in English because English is not the person's primary language
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
OCM	Office of Contract Management, Human Services Agency
OCP	Office of Community Partnerships
Older Adult	Person who is 60 years of age or older
Senior	Person who is 60 years of age or older; used interchangeably with "older adult".
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
SFHSA	San Francisco Human Services Agency
Socially Isolated	Having few social relationships and few people to interact with regularly
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and grantees that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the consumers they serve (Chapter 104, Sections 104.1 through 104.9.)

III. Target Population

This program is designed to serve all ethnicities and populations, with focused expertise to promote the unique cultural needs which have been identified as demonstrating the greatest economic and social need:

1. Persons with low income
2. Persons who are socially isolated
3. Persons with limited English-speaking proficiency
4. Persons from communities of color
5. Persons who identify as LGBTQ+
6. Persons at risk of institutionalization

IV. Eligibility for Services

To obtain housing subsidy services, an individual must meet the following criteria:

1. Aged 60 and above, or
2. Aged 18 to 59 with a disability, and
3. At an income level of 50% of AMI or below, and
4. Lacking stable housing and at risk for eviction and homelessness, and
5. A resident of San Francisco

V. Location and Time of Services

Eviction Defense Collaborative's housing subsidy services are administered at 976 Mission Street in San Francisco. Service drop-in hours are Monday, Tuesday, Wednesday, and Friday, 10:00 - 11:30am and 1:00 - 2:30pm.

VI. Description of Services

The housing subsidy services shall include the following five components: program infrastructure, consumer identification and eligibility, housing subsidy payments, housing subsidy recertification, and case planning.

1. Program Infrastructure:

- a. Program policies and procedures shall include all accounting procedures and reporting functions needed to administer the housing subsidy program.
- b. Grantee shall be able to provide administrative assistance, data entry, database maintenance, processing of invoices, payments to landlords, creation of purchase service contracts, and payment policies.
- c. Grantee shall have a dedicated database or contemporary record keeping process to capture case planning, case management, consumer information tracking, purchased services, and dollars spent for consumers on housing subsidies.

2. Consumer Identification and Eligibility:

- a. The program shall have policies and procedures clearly defining eligibility criteria as well as the processes of application, decision, award, and recertification.
- b. The program shall have clear policies and procedures for waitlists and other program functions as needed.

3. Housing Subsidy Payments:

- a. The program shall have policies and procedures describing all aspects of housing subsidy determination, maximums and/or minimum subsidy amounts, urgent subsidy situations, etc.
- b. Rental subsidies for consumers can be set up to \$1,000 per household per month. The subsidy shall be set at the lowest possible amount needed to stabilize the housing.
- c. The subsidy amount is determined by each household's rent to income ratio. The goal will be to use the housing subsidy to bring the household rent to income ratio to 30%. In the cases where a \$1,000 monthly subsidy is insufficient to reach the 30% rent to income ratio, the subsidy amount can be used to pay up to 50% of the consumer's income towards the rent. Essential medical payments (insurance, prescriptions, medical bills) can be deducted from the household income for subsidy calculation.
- d. In limited cases, when a subsidy of \$1,000 is insufficient to reduce the rent to income ratio to 50%, it may be increased up to and not to exceed \$1,200 per month. For consumers receiving a subsidy above \$1,000, their eligibility and needs for the increased subsidy shall be clearly documented, as well as a plan to reduce the future subsidy to \$1,000 or less. During the

periods when the monthly subsidy is above \$1,000, consumers shall undergo recertification every 6 months.

- e. Additional eligible payments under this program include back rent. Consumers who enroll into the program with back rent needs, may have up to 3 months of back rent paid, one time only, with the amount to be verified by the lease agreement and/or written communication with the landlord. Additional payments under this section shall be capped at \$5,000 total across all uses.
- f. Rent limits for consumers shall conform to HUD Fair Market Rents (FMR) for San Francisco Metro Area.
- g. Grantee must clearly demonstrate linkages to existing resources for income and other resources.
- h. Grantee will work to ensure sub-standard housing issues are addressed. When evaluating housing situation, an apartment inspection checklist will be utilized to ensure that units meet minimum safety guidelines. If consumers are living in sub-standard housing, subsidies can be used to pay rent on a new unit.
- i. Grantee will ensure that all housing subsidies paid for program consumers are reasonable, prudent, and properly procured.

4. Housing Subsidy Recertification:

- a. Grantee shall have policies and procedures regarding the process of recertification.
- b. Subsidies must be recertified at least once annually, and more frequently if there are concerns about the household's non-compliance, lack of progress, or if sub-standard housing or safety issues are present. Consumers with short-term needs shall be recertified at more frequent intervals to ensure continued eligibility.
- c. Subsidies shall be need-based as opposed to time-limited. The subsidy may be renewed if consumers are engaged in their identified plan and continue to meet program eligibility requirements.

5. Case Planning:

- a. Grantee shall have policies and procedures outlining the provision of case planning. Program consumers must participate in a case plan designed to stabilize their housing.
- b. Case plan goals may include but are not limited to:
 - i. Actions to increase income and access to other available resources which help lower overall household expenses.
 - ii. Actions to improve credit history and rental stability.
 - iii. Efforts to address behavioral health issues that negatively impact housing stability.
 - iv. Efforts to access more affordable housing, including applying to appropriate waitlists.
- c. Grantee shall be familiar with other community resources and assist consumers in connecting with other resources as needed. Grantee shall work collaboratively with other organizations that are working with the consumer in order to resolve housing issues if applicable.

Grantee may enhance the subsidy model described with additional components that will be effective in achieving successful outcomes.

VII. Service Objectives

Grantee will meet the following service objectives:

Service Objectives	FY 24-25	FY 25-26	FY 26-27	FY 27-28
Minimum number of unduplicated consumers who will receive housing subsidies	189	196	200	204
Minimum total number of months of housing subsidies to be provided by Grantee (One unit of service is one month of subsidy payment.)	1,817	1,886	1,921	1,956
Minimum number of unduplicated consumers to be transitioned off the housing subsidy program	10	10	10	10

VIII. Outcome Objectives

Outcome objectives will be measured through analysis of program data reported, plus the administration of an annual consumer survey by Grantee. Actual survey question structure and survey administration shall be approved by DAS/OCP staff in advance of survey release. Survey completion rate shall be 65% of total program consumers during the fiscal year.

1. Housing Retention Outcomes
 - a. At least **85%** of consumers are stably housed for 6 months after subsidies began.
 - b. At least **75%** of consumers remain stably housed for 12 months after subsidies began.

2. Consumer Satisfaction Outcomes
 - a. At least **75%** of consumers indicate that they were treated in a respectful and professional manner by program staff.
 - b. At least **75%** of consumers who received housing subsidies report that the subsidies have helped them keep stable housing.

IX. Reporting Requirements

Grantee will provide various reports during the term of the grant agreement:

1. Grantee shall enter consumers’ data into the SF DAS GetCare database system as required by DAS analyst staff. This shall include SOGI data.
2. Grantee shall enter all the units of service into the SF GetCare Service by the 5th working day of the month for the preceding month.
3. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS/OCP and OCM staff.

4. Grantee program staff shall complete the California Department of Aging (CDA) Security Awareness training and SF DAS Elder Abuse Prevention and Mandated Reporter Training on an annual basis. Grantee shall maintain the evidence of staff completion of the training.
5. The grantee shall submit response rates and aggregated data from the annual consumer satisfaction survey to OCP staff by March 15th of each grant year.
6. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 of each grant year.
7. Grantee shall develop and deliver ad hoc reports as requested by DAS/OCP.
8. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
9. Apart from reports to be sent via email to the Program Analyst and/or Contract Manager, all other reports and communications shall be sent to the following addresses:

Tahir Shaikh
 Senior Contracts Manager/RSA
 P.O. Box 7988
 San Francisco, CA 94120
Tahir.shaikh@sfgov.org

Zhiqing Li
 DAS, Office of Community Partnerships
 P.O. Box 7988
 San Francisco, CA 94120
Zhiqing.li@sfgov.org

X. Monitoring Activities

1. Program Monitoring: Program monitoring will include review of compliance with specific program standards or requirements, documentation of consumer eligibility and targeted mandates, records of the units of services and all reports, progress of service and outcome objectives, consumer records' collection and maintenance, reporting performance including monthly service unit reports on SF DAS Getcare, current organizational chart, evidence of program staff's training on Elder Abuse Reporting and California Department of Aging (CDA) Security Awareness Training, written policies and procedures manuals of all DAS/OCP funded programs, written project income policies if applicable, grievance procedure posted onsite and provided for the homebound consumers, site chart with updated hours of operation, a list of board of directors with age and ethnicity information, and outcomes of service provision according to Sections VI, VII, and VIII.
2. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance, and HIPAA compliance.