

File No. 140124

Committee Item No. 5

Board Item No. \_\_\_\_\_

## COMMITTEE/BOARD OF SUPERVISORS

### AGENDA PACKET CONTENTS LIST

Committee: Budget and Finance Sub-Committee

Date: 3/12/2014

Board of Supervisors Meeting

Date: \_\_\_\_\_

#### Cmte Board

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| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Resolution                                   |
| <input type="checkbox"/>            | <input type="checkbox"/> | Ordinance                                    |
| <input type="checkbox"/>            | <input type="checkbox"/> | Legislative Digest                           |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Budget and Legislative Analyst Report        |
| <input type="checkbox"/>            | <input type="checkbox"/> | Legislative Analyst Report                   |
| <input type="checkbox"/>            | <input type="checkbox"/> | Youth Commission Report                      |
| <input type="checkbox"/>            | <input type="checkbox"/> | Introduction Form                            |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Department/Agency Cover Letter and/or Report |
| <input type="checkbox"/>            | <input type="checkbox"/> | MOU  |
| <input type="checkbox"/>            | <input type="checkbox"/> | Grant Information Form                       |
| <input type="checkbox"/>            | <input type="checkbox"/> | Grant Budget                                 |
| <input type="checkbox"/>            | <input type="checkbox"/> | Subcontract Budget                           |
| <input type="checkbox"/>            | <input type="checkbox"/> | Contract/Agreement                           |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Form 126 – Ethics Commission                 |
| <input type="checkbox"/>            | <input type="checkbox"/> | Award Letter                                 |
| <input type="checkbox"/>            | <input type="checkbox"/> | Application                                  |
| <input type="checkbox"/>            | <input type="checkbox"/> | Public Correspondence                        |

OTHER (Use back side if additional space is needed)

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Completed by: Victor Young

Date March 7, 2014

Completed by: \_\_\_\_\_

Date \_\_\_\_\_

1 [Authorizing Expenditures - South of Market Community Stabilization Fund - \$105,000]

2  
3 **Resolution authorizing the Mayor's Office of Housing and Community Development to**  
4 **expend South of Market Community Stabilization Fund dollars in the amount of**  
5 **\$105,000 for capacity building and tenant counseling services.**  
6

7 WHEREAS, On August 19, 2005, the Board of Supervisors approved Ordinance No.  
8 217-05 (the Ordinance), adding a new Section 318 to the Planning Code, which, among other  
9 things, established a new Rincon Hill Downtown Residential District; and,

10 WHEREAS, The Ordinance imposed a South of Market (SOMA) Community  
11 Stabilization Fee on residential development within the new Residential District; and,

12 WHEREAS, The money collected from the SOMA Community Stabilization Fee, along  
13 with up to \$6,000,000 transferred from the Rincon Hill Community Improvements Fund that  
14 was also established under the Ordinance, is in a separate fund called the SOMA Community  
15 Stabilization Fund maintained by the Controller (Fund), which will be used to address various  
16 impacts of destabilization on residents and businesses in SOMA; and,

17 WHEREAS, Under the Ordinance, the Board of Supervisors established the SOMA  
18 Community Stabilization Fund Community Advisory Committee (SOMA CAC) to advise the  
19 Mayor's Office of Community Development (MOCD), now the Mayor's Office of Housing and  
20 Community Development (MOHCD), and the Board of Supervisors on the uses of the Fund;  
21 and,

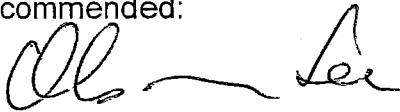
22 WHEREAS, Under Resolution No. 216-08, the Board of Supervisors approved the  
23 SOMA Community Stabilization Fund Strategic Plan and authorized MOHCD to administer the  
24 Fund in accordance with the Strategic Plan; and  
25

1           WHEREAS, The SOMA CAC and MOHCD staff worked collaboratively to issue a  
2 request for proposals (RFP) August 12, 2013, consistent with the Strategic Plan, for nonprofit  
3 organizations and businesses seeking assistance from the Fund; and

4           WHEREAS, A copy of the SOMA CAC Funding Recommendations resulting from the  
5 RFP has been filed with the Clerk of the Board under File No. 140124, now, therefore, be  
6 it

7           RESOLVED, That the Mayor's Office of Housing and Community Development is  
8 hereby authorized to expend \$105,000 from the SOMA Community Stabilization Fund, all in  
9 accordance with the purposes and goals for the funding as generally set forth in the Strategic  
10 Plan and the Funding Recommendations.

11  
12 Recommended:

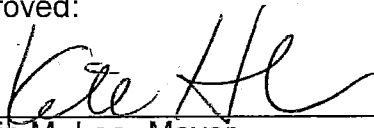
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Olson Lee, Director

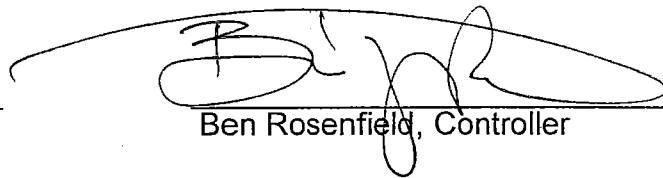
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16 Approved:

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Edwin M. Lee, Mayor

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Ben Rosenfield, Controller

**Item 5**  
**File 14-0124**

**Department(s):**  
Mayor's Office of Housing (MOHCD)

### EXECUTIVE SUMMARY

#### Legislative Objective

- The proposed resolution would authorize an expenditure of \$105,000 from the South of Market Area (SOMA) Community Stabilization Fund to fund the non-profit organization, Veterans Equity Center, to provide organizational capacity building and support for tenant counseling services.

#### Key Points

- Under the City's Planning Code, developers constructing new residential development in the Rincon Hill Downtown Residential District pay development impact fees (South of Market Community Stabilization Fee) of \$10.95 per square foot. Fee revenues are deposited into the SOMA Community Stabilization Fund to be used for housing and economic and workforce development. The MOHCD administers the SOMA Community Stabilization Fund, and the Community Stabilization Fund Community Advisory Committee advises on the use of fees allocated to the SOMA Community Stabilization Fund revenues, subject to Board of Supervisors approval.
- Based on a competitive Request for Proposal (RFP) process, the Community Stabilization Fund Community Advisory Committee and MOHCD recommended \$165,000 for a grant to Veterans Equity Center, a non-profit organization, for the provision of organizational capacity building and support for tenant counseling services.
- The sources of funds for this grant include \$105,000 in SOMA Community Stabilization Funds and \$60,000 in funds appropriated by the Board of Supervisors through the FY 2013-14 budget review process.
- MOHCD previously allocated \$60,000 of the \$165,000 grant to the Veterans Equity Center, effective October 1, 2013. The proposed resolution authorizes the expenditure of the additional \$105,000 in SOMA Community Stabilization Funds as part of the total grant award.
- The term of this grant will be 18 months from October 1, 2013 through March 31, 2015.

#### Fiscal Impact

- The SOMA Community Stabilization Fund currently has an available balance of \$4,257,287. If the proposed resolution is approved authorizing \$105,000 of expenditures from the SOMA Community Stabilization Fund, the SOMA Community Stabilization Fund balance would be reduced to \$4,152,287.

#### Recommendation

- Approve the proposed resolution.

**BACKGROUND/MANDATE STATEMENT****Mandate Statement**

In accordance with Planning Code Section 418.7, all monies in the South of Market Area (SOMA) Community Stabilization Fund are to be expended in order to address the effects of destabilization on residents and businesses in SOMA due to new residential development in the Rincon Hill Area, subject to conditions specified in the Planning Code. In accordance with Section 418.7(c) of the Planning Code, the SOMA Community Stabilization Fund expenditures are administered by the Mayor's Office of Housing and Community Development (MOHCD), subject to approval by resolution of the Board of Supervisors. In approving expenditures from the Fund, (a) MOHCD and the Board of Supervisors shall consider any comments from the SOMA Community Stabilization Fund Community Advisory Committee, the public, and any relevant City departments or offices, and (b) the Board of Supervisors shall determine the relative impact from the development in the Rincon Hill Plan Area and shall insure that the expenditures are consistent with mitigating the impacts from the development.

**Background**

The Board of Supervisors approved a new Section 318 in the City's Planning Code in 2005, which among other provisions, (a) established the Rincon Hill Downtown Residential District<sup>1</sup>, (b) created a Rincon Hill Community Improvement Fund, (c) imposed a South of Market Area (SOMA) Community Stabilization Fee of \$14 per square foot (subsequently amended down to \$10.95 per square foot by the Board of Supervisors under Ordinance 270-10) on developers who build new residential development within the Rincon Hill Downtown Residential District, (d) created the SOMA Community Stabilization Fund, and (e) established a SOMA Community Stabilization Fund Community Advisory Committee (CAC) to advise the MOHCD and the Board of Supervisors on the uses of the SOMA Community Stabilization Fund (Ordinance 217-05).

In accordance with Section 418.7 of the Planning Code, monies in the SOMA Community Stabilization Fund are to be used to address the effects of destabilization on residents and businesses in SOMA due to new residential development in the Rincon Hill Area. Under the Planning Code, the SOMA Community Stabilization Fund is to be used for housing, and economic and workforce development.

The Board of Supervisors approved a resolution in 2008 (Resolution 0216-08) (a) approving the SOMA Community Stabilization Fund Strategic Plan, (b) authorizing MOHCD to administer the SOMA Community Stabilization Fund in accordance with this Strategic Plan, and (c) authorizing MOHCD to work with the SOMA Stabilization Fund Community Advisory Committee to issue Requests for Proposals (RFPs) for non-profit agencies to provide services addressing the effects of destabilization on residents and businesses in SOMA, consistent with the Community Stabilization Fund Strategic Plan. In 2011, the SOMA Stabilization Fund Community Advisory

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<sup>1</sup> The Rincon Hill Downtown Residential District is the area bounded by Folsom Street, The Embarcadero, Bryant Street, and Essex Street.

Committee revised the Community Stabilization Fund Strategic Plan to articulate four goals, which include:

- 1) Strengthen community cohesion
- 2) Support economic and workforce development for low-income residents and businesses that serve the SOMA community
- 3) Increase access to perpetually affordable housing opportunities for existing SOMA residents
- 4) Improve the infrastructure and physical environment

#### *RFP Process*

MOHCD issued an RFP in August 2013 announcing that \$165,000 would be made available for organizational capacity building and tenant counseling and case management services for low-income residents and low-income workers in SOMA. The grant period stated in the RFP is October 1, 2013 through March 31, 2015, and is one-time funding.

The Veterans Equity Center was the sole respondent to the RFP.

#### *Grant Source of Funds*

Funds for the Organizational Capacity Building and Tenant Counseling grant awarded to the Veterans Equity Center, a nonprofit agency which provides tenant outreach and case management services. The grant award is derived from two sources: (1) \$105,000 from the SOMA Community Stabilization Fund (subject of this resolution), and (2) \$60,000 appropriated by the Board of Supervisors in MOHCD's FY 2013-14 budget.

According to Ms. Claudia Del Rosario, MOHCD SOMA Community Stabilization Fund Director, the \$165,000 grant was divided into two separate awards of \$105,000 and \$60,000 respectively. MOHCD awarded the \$60,000 grant to the Veterans Equity Center, effective on October 1, 2013.

### **DETAILS OF PROPOSED LEGISLATION**

The proposed resolution would authorize \$105,000 of expenditures from the SOMA Community Stabilization Fund to fund the Veterans Equity Center to provide organizational capacity building and tenant counseling services.

Organizational capacity building efforts through this grant include (1) development of a strategic plan to diversify the composition of the Veterans Equity Center, and (2) creation of a fund development plan to enhance organizational sustainability.

Tenant counseling services proposed through this grant include (1) intake and assessment of housing needs/barriers of individuals in SOMA through tenant counseling, (2) providing resources to consumers, (3) developing an individualized care plan to address needs/barriers, and (4) referrals to appropriate agencies and service providers.

**FISCAL IMPACT**

Total funds for the Veterans Equity Center to provide organizational capacity building and tenant counseling services are \$165,000, including \$60,000 previously appropriated by the Board of Supervisors in the FY 2013-14 budget and \$105,000 from the SOMA Community Stabilization Fund.

The budget for the proposed \$165,000 is shown in Table 1 below.

**Table 1: Proposed Grant Budget**

Budget Item	Requested amount
Staff salaries and benefits	\$118,495
Consultant Fees	\$25,000
Training Expenses	\$15,736
Indirect Costs	\$3,763
Other	\$2,006
<b>Total</b>	<b>\$165,000</b>

As shown in Table 2 below, from FY 2005-06, when the SOMA Community Stabilization Fund was established, to FY 2013-14, \$10,071,623 was deposited into the Fund.

<b>Table 2: Revenues Deposited to the SOMA Community Stabilization Fund (Through January 31, 2014)</b>			
	Development Impact Fees	Transfers from Rincon Hill Community Improvement Fund and SOMA Community Stabilization Fund	Total Revenue
FY 2005-2006	\$98,471	\$0	\$98,471
FY 2006-2007	0	203,292	203,292
FY 2007-2008	0	0	0
FY 2008-2009	67,324	0	67,324
FY 2009-2010	4,962,933	350,000	5,312,933
FY 2010-2011	2,807,128	589,626	3,396,754
FY 2011-2012	(81,761)*	0	(81,761)
FY 2012-2013	185,874	0	185,874
FY 2013-2014	626,591	0	\$626,591
Subtotal	\$8,666,560	\$1,142,918	\$9,809,478
Interest Earnings			\$262,145
<b>Total</b>			<b>\$10,071,623</b>

\* Return of fees collected erroneously in the prior fiscal year for 333 Harrison project.

Source: Mayor's Office of Housing and Community Development

As shown in Table 3 below, SOMA Community Stabilization Fund expenditures, previously authorized by the Board of Supervisors, total \$5,814,336, including expenditures for non-profit agencies and MOHCD and City Attorney costs. This results in an available fund balance of \$4,257,287.

<b>Table 3: Expenditures from the SOMA Community Stabilization Fund (Through January 31, 2014)</b>				
	<b>Salaries, Benefits and Other Costs</b>	<b>Inclusionary Housing Study</b>	<b>Grant Expenditures</b>	<b>Total Expenditures</b>
FY 2006-2007	\$45,614	\$40,000	\$0	\$85,614
FY 2007-2008	82,452	110,000	0	192,452
FY 2008-2009	185,596	0	0	185,596
FY 2009-2010	102,090*	0	0	102,090
FY 2010-2011	135,719*	0	3,613,462	3,749,181
FY 2011-2012	160,709*	0	404,411	565,120
FY 2012-2013	149,770*	0	606,621	756,391
FY2013-2014	66,930	0	110,962	177,892
<b>Total</b>	<b>\$928,880</b>	<b>\$150,000</b>	<b>\$4,735,456</b>	<b>\$5,814,336</b>

\* Includes advertising for public hearing and City Attorney costs.

Source: Mayor's Office of Housing and Community Development

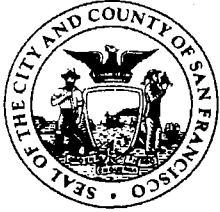
If the proposed resolution authorizing \$105,000 of expenditures from the SOMA Community Stabilization Fund is approved, the remaining Fund balance would be \$4,152,287.

## RECOMMENDATION

Approve the proposed resolution.



**MAYOR'S OFFICE OF HOUSING AND  
COMMUNITY DEVELOPMENT  
CITY AND COUNTY OF SAN FRANCISCO**



**EDWIN M. LEE  
MAYOR**

**OLSON LEE  
DIRECTOR**

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MEMORANDUM

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To: Angela Calvillo, Clerk of the Board of Supervisors  
From: Olson Lee, Director  
Date: January 24, 2014  
Subject: Expend Resolution: SOMA Community Stabilization Fund

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Attached are original and 2 copies of each of the following:

- Proposed resolution
- Funding Recommendations
- Ethics Form 126

**Departmental representative in charge of the project:**

Name: Claudine del Rosario  
Phone: 701-5580  
Interoffice Mail Address: [Claudine.delrosario@sfgov.org](mailto:Claudine.delrosario@sfgov.org)

Funding Recommendations | January  
for South of Market Community Stabilization Fund | 2014

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Activity Name and Location

Program Description

Rec.

*Capacity Building and Tenant Counseling Services*

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**Veterans Equity Center/Bill Sorro  
Housing Program**

Provide organizational capacity building and support for  
tenant counseling services.

\$105,000

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File #140124

**MAYOR'S OFFICE OF HOUSING AND COMMUNITY DEVELOPMENT**

**CITY & COUNTY OF SAN FRANCISCO**

**REQUEST FOR PROPOSAL**

**ORGANIZATIONAL CAPACITY BUILDING  
&  
TENANT COUNSELING**

**August 2013**

**Deadline for Submitting Applications:**

5:00 p.m., Friday, August 30, 2013

One original and three copies of the completed proposal should be submitted to:

Mayor's Office of Housing and Community Development

1 South Van Ness Avenue, 5<sup>th</sup> Floor

**Attention: Claudine M. del Rosario**

**HAND DELIVERY RECOMMENDED**

**Technical Assistance Conference**

The Mayor's Office of Housing and Community Development will conduct a technical assistance conference to assist interested applicants in assessing the eligibility and scope of proposed projects, and in completing the required elements of proposals. This meeting will be held:

**Wednesday, August 21, 2013**

**11:00 a.m. to 1:00 p.m.**

**1 South Van Ness Avenue, 5<sup>th</sup> Floor**

**REQUEST FOR PROPOSAL FOR  
CAPACITY BUILDING AND TENANT COUNSELING IN SoMa**

**I. Introduction**

The Mayor's Office of Housing and Community Development (MOHCD) is seeking to fund services and organizational capacity building projects for an agency that provides tenant counseling and case management services for low income residents and low income workers in the South of Market neighborhood of the South of Market neighborhood. The grant period will be from October 1, 2013, through March 31, 2015. This is strictly one-time funding. Criteria for each element of the program are described in this document.

**II. Notice of Funding Availability**

This is a Request for Proposal (RFP) from MOHCD announcing that \$165,000 will be made available to provide organizational capacity building and support for tenant counseling services for a SoMa organization. *At least* \$40,000 of the allocated funds **MUST** be budgeted for organizational capacity building and development.

**III. Technical Assistance**

Questions on completing the application can be addressed at the Technical Assistance Conference, or you can contact Claudine del Rosario (415) 701-5580 or e-mail: [claudine.delrosario@sfgov.org](mailto:claudine.delrosario@sfgov.org)

There will be a **Technical Assistance Conference** to assist interested applicants in determining eligibility and completing the required elements of the proposal package. This workshop is scheduled for:

Wednesday, August 21, 2013  
11:00 a.m. to 1:00 p.m.  
1 South Van Ness Avenue, 5<sup>th</sup> Floor, Conference Room 5080

**IV. Review Process and Schedule**

All submitted proposals will be initially screened by a committee composed of MOHCD staff to determine completeness and eligibility. Ineligible proposals will be eliminated at this stage. MOHCD staff will evaluate all complete and eligible proposals. The MOHCD Director will make the final selection of the agencies/agency to be awarded a grant(s).

**V. The preliminary schedule for review and approval is:**

August 30, 2013	Proposals due to MOHCD by 5:00pm
September 5, 2013	Agencies notified of award
September 6 – September 30, 2013	Contract negotiation
October 1, 2013	Program begins

\*Please note that \$105,000 of this grant is subject to all requirements of the South of Market Community Stabilization Fund. (please see priorities and details at <http://sf-moh.org/index.aspx?page=937>). The initial \$60,000 (General Fund) of the grant will be encumbered by October 2013. The remaining \$105,000 from the SoMa Fund must be approved by the Board of Supervisors and will be calendared after the proposal review process.

Note: Successful applicants will be required to execute and meet the provisions of a grant agreement. Additional documentation, including an annual work plan and an annual budget, must be completed and approved by MOHCD prior to any funds being committed or spent. Financing is primarily on a monthly cost-reimbursement basis. Successful applicants will be expected to participate in MOHCD online programmatic and financial reporting system. Expenses incurred prior to start of the contract are not eligible for reimbursement.

**Organizational Capacity Building**

Work with a consultant to conduct organizational capacity building for an agency that provides tenant counseling and case management services for low income residents in the South of Market neighborhood. Funded agency will work closely with MOHCD to develop and implement a capacity building plan and identify a consultant to work with.

<p><b>Priority</b></p>	<p>Priority will be given to those agencies that have a successful track record of providing demonstrate:</p> <ol style="list-style-type: none"> <li>1. A commitment and history of effectively serving low-income residents and low-income of SoMa to assist with placement in permanent affordable housing</li> <li>2. An ability to use this grant to address significant capacity issues</li> <li>3. A clear strategy for utilizing funds to increase organizational capacity and provide professional development of staff, board, and volunteers</li> <li>4. A clear strategy for utilizing these funds to address issues of long-term organizational sustainability</li> <li>5. A clear strategy for utilizing these funds to prepare a resource development and fundraising plan</li> </ol>
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<p><b>Eligibility</b></p>	<ol style="list-style-type: none"> <li>1. Programs must principally benefit low and moderate-income residents of SoMa.</li> <li>2. Beneficiaries must reside within the boundaries of the City and County of San Francisco and at least 50% of the beneficiaries must reside within the boundaries of SoMa as defined by the South of Market Community Stabilization Fund.</li> <li>3. Applicants must be San Francisco-based; must be a 501(C)(3) non-profit corporation registered with the Internal Revenue Service; and must be in good standing with the State of California's Registry of Charitable Trusts.</li> <li>4. Applicants may submit as single agencies or as a collaborative; however, collaborative proposals must choose a lead agency to serve as the fiscal agent. The fiscal agent should submit its own organizational documentation as directed below in the same manner as if it was a single agency.</li> <li>5. Applicants must demonstrate a history and track record of providing services and support to the SoMa neighborhood with access to affordable housing opportunities including inclusionary housing units and nonprofit housing developments.</li> </ol>
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	6. Successful applicants must comply with all applicable local government regulations.
<b>Evaluation Criteria</b>	<p>MOHCD will evaluate proposals based on the following factors and criteria:</p> <ol style="list-style-type: none"> <li>1. Based on track record, the extent to which the applicant demonstrates the capacity to effectively administer a comprehensive housing case management program and produce measurable outcomes. If an applicant submits a collaborative proposal, information about all collaborative members should be described.</li> <li>2. The extent to which proposed activities meet priorities, eligibility and requirements outlined in the RFP and align with local and national best practices.</li> <li>3. The extent to which program activities exhibit cultural competencies reaching and working with populations that are lower-income and racial/ethnic minorities.</li> <li>4. The extent to which the proposal outlines specific, measurable and realistic service and capacity building outcomes for the organization, which will enhance its ability to provide effective and sustainable services to the community.</li> <li>5. The extent to which funds are leveraged by other resources and add capacity to existing services.</li> </ol>
<b>Requirements</b>	<p>The use of City funds is subject to numerous local requirements. A few of the requirements are listed below and are briefly summarized.</p> <ul style="list-style-type: none"> <li>• <b>Accessibility:</b> programs and services must be accessible to persons with disabilities. Program access can be achieved in many cases without having to alter the existing facility.</li> <li>• <b>Non-Discrimination:</b> agencies must comply with federal and SF Human Rights Commission prohibitions against discrimination in fair housing and equal employment opportunity, and in awarding contracts. Agencies must also comply with the Equal Benefits Ordinance for domestic partners.</li> <li>• <b>Environmental Review:</b> must be completed before funds can be utilized.</li> <li>• <b>Procurement:</b> projects must comply with federal conflict of interest regulations, and regulatory procedures for obtaining and contracting for goods and services.</li> <li>• <b>Ineligible Reimbursements:</b> funds for activities occurring prior to the commencement date of the grant agreement cannot be reimbursed.</li> <li>• <b>Religious Activity:</b> funds may not be used for religious purposes or for the improvements of property owned by religious entities except where the grant recipient is a secular non-profit organization with a long term lease.</li> <li>• <b>Political Activity:</b> funds may not be used for political activity.</li> </ul>

<p><b>Reporting</b></p>	<p>Grantee(s) will be expected to report monthly on the following impact measures including, but not limited to,</p> <ul style="list-style-type: none"> <li>• # of clients served</li> <li>• # of completed applications</li> </ul> <p>Grantee(s) will also be expected to report monthly on the progress of capacity building activities. For example:</p> <ul style="list-style-type: none"> <li>• How many trainings are provided to staff?</li> <li>• How many Board members engage in capacity building activities and how many workshops/activities are provided?</li> <li>• What other sources of funding are secured to provide ongoing support to the program?</li> </ul>
<p><b>Board of Directors</b></p>	<ul style="list-style-type: none"> <li>• Board and staff must have broad based experience and skills to satisfactorily manage and guide the organization;</li> <li>• The Board of Directors must provide vision, oversight and direction to the organization;</li> <li>• The Board of Directors should include San Francisco residents or demonstrate knowledge of the needs of low income San Franciscans. Representation on the board of low income residents and from the priority population is encouraged.</li> </ul>

## APPLICATION INSTRUCTIONS

- Please be as succinct as possible. The narrative section must be no longer than five pages. Reviewers will not consider text beyond the indicated text limitations and/or space provided.
- No handwritten proposals will be accepted. Proposals must be typed or computer generated. The font must be at least 10 point.
- Pages should be standard 8-1/2" by 11". All copies should be double-sided and double spaced.
- Original signatures must be in blue ink on the original set.
- Use the application checklist to ensure your package is complete.
- Do not bind proposals, or submit extra materials not requested.
- Substantially incomplete, faxed, or late applications will not be considered. **Hand delivery is recommended by 5:00pm. No application will be accepted after 5:00pm on Friday, August 30<sup>th</sup>.**

### **Deadline for Submitting Applications:**

5:00 p.m., Friday, August 30, 2013

One original and 3 copies of the completed proposal should be submitted to:

Mayors' Office of Housing and Community Development

1 South Van Ness Avenue, 5<sup>th</sup> Floor

**Attention: Claudine M. del Rosario**

**HAND DELIVERY RECOMMENDED**

### **AGENCY APPLICATION CHECKLIST** *(one original and three copies)*

- Applicant Information
- Application Narrative
- Program Budget Worksheet

### **Additional required items for applicants not currently receiving MOHCD funding**

*(one copy attached to the original set):*

- Articles of Incorporation, including all amendments
- Organization by-laws, including all amendments
- Evidence of Federal Tax Exempt 501(c) (3) status



## APPLICANT INFORMATION

*(Please type all responses no smaller than 10 font)*

Organization Name: \_\_\_\_\_

Street Address: \_\_\_\_\_ San Francisco, CA 941 \_\_\_\_\_

Project Location (if different): \_\_\_\_\_ San Francisco, CA 941 \_\_\_\_\_

Main Phone: \_\_\_\_\_ Fax : \_\_\_\_\_

Executive Director: \_\_\_\_\_ Telephone: \_\_\_\_\_ x \_\_\_\_\_

Board President: \_\_\_\_\_ Telephone: \_\_\_\_\_ x \_\_\_\_\_

Contact Person: \_\_\_\_\_ Telephone: \_\_\_\_\_ x \_\_\_\_\_

Fax: \_\_\_\_\_ Email: \_\_\_\_\_

Amount requested under this Application: **(must not exceed \$165,000)**

Total Program Activity/Project Budget: \$ \_\_\_\_\_

Total FY 2013-2014 Projected Agency Budget: \$ \_\_\_\_\_

**I certify that the information provided in this application is true:**

\_\_\_\_\_  
Signature of Executive Director

\_\_\_\_\_  
Date

**APPLICATION NARRATIVE** (the narrative should not exceed five pages)

**1. Background and Need:** (2-4 paragraphs)

This section should demonstrate a broad understanding of South of Market community needs, and agency track record of providing tenant consulting and case management services to low-income residents of the South of Market. This section should provide a clear picture of challenges faced by this population, as well as successful strategies implemented by your organization to address these.

- What data or information supports the need for the work your organization provides?
- How will strengthening the capacity of your organization serve low-income residents of SoMa
- What gaps in current capacity and services to support low and moderate-income residents does the proposal attempt to fill?
- Describe the barriers SoMa residents and workers face in accessing affordable housing opportunities

**2. Proposed Activities:** (No more than 2 pages)

This section should describe the service and capacity building work that your agency is proposing to accomplish.

Services: Please provide a detailed workplan that your organization will use to maximize the number of qualified applicants from the diverse pool of priority populations. This workplan should include activities and quantifiable performance measures for each activity. Please provide projections to estimate how many clients will be served, how many applications will be filed, how many qualified applications will be files and how many case management activities will be conducted.

Capacity Building: This section should provide information about agency's ability to work with MOHCD and a consultant to develop and implement a capacity building plan that will include, but not be limited to, board development, governance, finance management, and fundraising. This section should also describe desired qualifications for consultants to provide capacity building services.

- How will the funded activities successfully achieve greater organizational capacity?
- How will the agency select a consultant to work with on this project?
- How will the funded activities provide effective professional development for staff, board, and volunteers? For example: What kind of training will be offered to staff, board and volunteers? How will issues of board roles and responsibilities be addressed?
- How will the funded activities address issues of long-term organizational sustainability? For example: Will this grant include elements of strategic planning? Will it include development of a fundraising plan?
- What, if any, fees or other costs to clients would be associated with service delivery and what is the justification for these fees or costs?

**3. Objectives and Outcomes:** (3-4 paragraphs)

This section should list objectives for your proposal and include specific activities (pg. 2) and outcomes for each objective.

Services: Please provide projections to estimate how many clients will be served, how many qualified applications will be files, and how many case management activities will be conducted.

**Capacity Building:** Objectives describe the capacity building activities the organization will undertake. Objectives should be described in a way that gives a specific timeline for their completion. This section should include information such as

- Specific capacity issues to be addressed
- Number of specific capacity building and staff development activities (trainings and workshops attended or held, etc.)
- Long term goals regarding infrastructure development and organizational sustainability

4. **Evaluation:** (1-2 paragraphs)

This section should describe how you will evaluate the impact of this capacity building work.

- How will you track progress?
- How will you evaluate impact and success of this work on organizational capacity and sustainability?

5. **Organization Capacity:** (2-3 paragraphs)

Discuss your ability to implement the proposed work, including roles and the capacity of current staff and board to work with consultant and implement program.

**List your Board of Directors:**

Name	Neighborhood	Affiliation/Occupation	List Any Other Board Memberships
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# MOHCD Program Budget Worksheet

Agency: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Line	Budget Item			Requested Amount from MOHCD	Total Program Budget
<b>Salaries &amp; Wages</b>					
	NAME - TITLE	Rate/Hr.	# of Hrs.	\$	\$
1				\$	\$
2				\$	\$
3				\$	\$
4				\$	\$
5				\$	\$
6				\$	\$
7				\$	\$
8				\$	\$
9	<b>Total Salaries (Lines 1 thru 8)</b>			\$	\$
<b>Fringe Benefits</b>					
	Item				
10	FICA			\$	\$
11	SUI			\$	\$
12	Workers Compensation			\$	\$
13	Medical Insurance			\$	\$
14	Retirement			\$	\$
15	Other			\$	\$
16	<b>Total Fringe Benefits (Lines 10 thru 15)</b>			\$	\$
<b>Contractual Services</b>					
	Item				
17				\$	\$
18				\$	\$
19				\$	\$
20				\$	\$
21				\$	\$
22	<b>Total Contractual Services (Lines 17 thru 21)</b>			\$	\$
<b>Equipment</b>					
23				\$	\$
24				\$	\$
25				\$	\$
26	<b>Total Equipment (Lines 23 thru 25)</b>			\$	\$
<b>Insurance</b>					
27				\$	\$
28				\$	\$
29				\$	\$
30				\$	\$
31				\$	\$

32	<b>Total Insurance (Lines 27 thru 31)</b>			\$	\$
<b>Travel &amp; Conferences</b>					
33				\$	\$
34				\$	\$
35				\$	\$
36	<b>Total Travel (Lines 33 thru 35)</b>			\$	\$
	<b>Space Rental (Office/Program Space)</b>				
37	<b>Total Space Rental</b>			\$	\$
	<b>Supplies</b>				
38	<b>Total Office Supplies</b>			\$	\$
	<b>Telecommunications (Phone)</b>				
39	<b>Total Telecommunications</b>			\$	\$
	<b>Utilities</b>				
40	<b>Total Utilities</b>			\$	\$
	<b>OTHER</b>				
41				\$	\$
42				\$	\$
43				\$	\$
44				\$	\$
45	<b>Total Other (Lines 41 thru 45)</b>			\$	\$
	<b>Indirect</b>				
46	<b>Total Indirect (no more than 15%)</b>			\$	\$
47	<b>Total (Line 9+16+22+26+32+36+37+38+39+40+46)</b>			\$	\$

Print Form

# Introduction Form

By a Member of the Board of Supervisors or the Mayor

Time stamp  
or meeting date

I hereby submit the following item for introduction (select only one):

- 1. For reference to Committee.  
An ordinance, resolution, motion, or charter amendment.
- 2. Request for next printed agenda without reference to Committee.
- 3. Request for hearing on a subject matter at Committee.
- 4. Request for letter beginning "Supervisor [ ] inquires"
- 5. City Attorney request.
- 6. Call File No. [ ] from Committee.
- 7. Budget Analyst request (attach written motion).
- 8. Substitute Legislation File No. [ ]
- 9. Request for Closed Session (attach written motion).
- 10. Board to Sit as A Committee of the Whole.
- 11. Question(s) submitted for Mayoral Appearance before the BOS on [ ]

Please check the appropriate boxes. The proposed legislation should be forwarded to the following:

- Small Business Commission
- Youth Commission
- Ethics Commission
- Planning Commission
- Building Inspection Commission

**Note: For the Imperative Agenda (a resolution not on the printed agenda), use a Imperative**

**Sponsor(s):**

Jane Kim

**Subject:**

Authorizing Expenditures - SoMa Community Stabilization Fund - \$105,000

**The text is listed below or attached:**

See attached.

Signature of Sponsoring Supervisor: 

For Clerk's Use Only:

140124

**FORM SFEC-126:**  
**NOTIFICATION OF CONTRACT APPROVAL**  
 (S.F. Campaign and Governmental Conduct Code § 1.126)

<b>City Elective Officer Information</b> <i>(Please print clearly.)</i>	
Name of City elective officer(s): Members, Board of Supervisors	City elective office(s) held: Members, Board of Supervisors

<b>Contractor Information</b> <i>(Please print clearly.)</i>	
Name of contractor: Veteran's Equity Center	
<i>Please list the names of (1) members of the contractor's board of directors; (2) the contractor's chief executive officer, chief financial officer and chief operating officer; (3) any person who has an ownership of 20 percent or more in the contractor; (4) any subcontractor listed in the bid or contract; and (5) any political committee sponsored or controlled by the contractor. Use additional pages as necessary.</i>	
See Attached	
Contractor address: 1010 Mission Street, San Francisco, CA 94103	
Date that contract was approved:	Amount of contracts: \$105,000
Describe the nature of the contract that was approved: SOMA Community Stabilization Fund	
Comments:	

This contract was approved by (check applicable):

the City elective officer(s) identified on this form

a board on which the City elective officer(s) serves: San Francisco Board of Supervisors  
Print Name of Board

the board of a state agency (Health Authority, Housing Authority Commission, Industrial Development Authority Board, Parking Authority, Redevelopment Agency Commission, Relocation Appeals Board, Treasure Island Development Authority) on which an appointee of the City elective officer(s) identified on this form sits

Print Name of Board

<b>Filer Information</b> <i>(Please print clearly.)</i>	
Name of filer: Angela Calvillo, Clerk of the Board	Contact telephone number: ( 415 ) 554-5184
Address: City Hall, Room 244, 1 Dr. Carlton B. Goodlett Pl., San Francisco, CA 94102	E-mail: Board.of.Supervisors@sfgov.org

\_\_\_\_\_  
Signature of City Elective Officer (if submitted by City elective officer)

\_\_\_\_\_  
Date Signed

\_\_\_\_\_  
Signature of Board Secretary or Clerk (if submitted by Board Secretary or Clerk)

\_\_\_\_\_  
Date Signed



VETERANS EQUITY CENTER'S BOARD OF DIRECTORS NAME & CONTACT INFORMATION
<p>Lourdes Santos Tancinco, Esq. – Board President            One Hallidie Plaza, Suite 818            San Francisco, CA 94102            Other affiliations: Filipino-American Development Foundation, Clementina Towers</p>
<p>Roy Recio – Secretary            38 Foote Street            San Francisco, CA 94112            Other affiliations: Manilatown Heritage Foundation</p>
<p>Bernadette Borja Sy – Treasurer            1010 Mission Street            San Francisco, CA 94103            Other affiliations: Clementina Towers, San Francisco Filipino Cultural Center, South of Market            Community Action Network</p>
<p>Regalado Baldonado – Filipino World War II Veteran/Consumer            1045 Capp Street, #302            San Francisco, CA 94110            Other affiliation: San Francisco Veterans Affairs Commission</p>
<p>Aurora Catingcoy - Consumer            54 McAllister Street #704            San Francisco, CA 94102</p>
<p>Lucio D. Dimaano – Filipino World War II Veteran/Consumer            670 Silver Avenue            San Francisco, CA 94134</p>
<p>Felix Junia – Filipino World War II Veteran/Consumer            85 Merced Avenue            San Francisco, CA 94127</p>
<p>Alberto Saldajeno – Filipino World War II Veteran/Consumer            205 Cerro Drive, Apt. B-413            Daly City, CA 94015</p>