



Shireen McSpadden, Executive Director

London Breed, Mayor

<b>To</b>	Homelessness Oversight Commission
<b>Through</b>	Shireen McSpadden, Executive Director
<b>From</b>	Marion Sanders, Chief Deputy Director Gigi Whitley, Chief of Finance and Administration Edilyn Velasquez, Director, Contracts
<b>Date</b>	November 7, 2024
<b>Subject</b>	Amended Grant Agreement Approval: Community Housing Partnership dba HomeRise   5 <sup>th</sup> & Harrison Transitional Living Program

<i>Agreement Information</i>	
<b>F\$P#</b>	1000013599
<b>Provider</b>	Community Housing Partnership dba HomeRise
<b>Program Name</b>	5 <sup>th</sup> & Harrison Transitional Living Program
<b>Agreement Action</b>	4 <sup>th</sup> Amendment
<b>Agreement Term</b>	July 1, 2019 – December 31, 2025

**Agreement Amount**

Current Budget <sup>1</sup>	Amended	New	Contingency <sup>2</sup>	Total Not to Exceed (NTE)
\$9,993,270	\$2,420,779	\$12,414,049	\$528,025	\$12,942,074

**Funding Summary**

Fiscal Year (FY)	Budget	Actual Spent <sup>3</sup>	Amended to Add	New Budget
2019-20	\$1,744,120	\$1,689,994	--	\$1,689,994
2020-21	\$1,734,552	\$1,566,676	--	\$1,566,676
2021-22	\$1,996,747	\$1,942,344	--	\$1,942,344
2022-23	\$2,180,480	\$1,829,863		\$1,829,863
2023-24	\$2,304,333	\$1,865,008		\$1,865,008
2024-25	\$1,099,385	\$0	\$1,247,391	\$2,346,776
2025-26			\$1,173,388	\$1,173,388
<b>TOTAL<sup>4</sup></b>	<b>\$9,315,497</b>	<b>\$8,893,885</b>	<b>\$2,420,779</b>	<b>\$12,414,049</b>
			<i>Contingency</i>	<i>\$528,025</i>
			<b>Total NTE<sup>5</sup></b>	<b>\$12,942,074</b>

<sup>1</sup> Current budget adjusted for actuals. Current Not-to-Exceed Amount is \$9,993,270.

<sup>2</sup> Contingency only applied to FY24-25 and FY25-26 budgeted amounts.

<sup>3</sup> At the time of this memo, FY24-25 invoices had not yet been submitted.

<sup>4</sup> Due to rounding, numbers presented may not add up precisely to the totals provided.

<sup>5</sup> NTE is calculated using the Actual Spent for prior years.

Funding Information	
Funding Sources <sup>6</sup>	100% General Fund

The Department of Homelessness and Supportive Housing (HSH) Contracts team requests authorization to amend the existing grant with HomeRise for the provision of 5<sup>th</sup> & Harrison Transitional Living Program for the period of July 1, 2019 to December 31, 2025 in an additional amount of \$2,420,779. The amendment includes fully funding FY24-25, and extending the term for six additional months of performance. The new amount is \$12,942,074, which includes a 15 percent contingency of \$528,025 on the FY24-25 and FY25-26 amounts.

### Background

Created in 2013, 5th & Harrison is a Transitional Living Program for Transitional Aged Youth (TAY) ages 18-24. This program is a part of the housing continuum in that it helps unhoused youth with temporary shelter, while linking them to employment, education, independent living skills, and additional supports that will aid in their transition to permanent housing. This program was put in place to teach youth how to live independently thus helping to decrease homelessness recidivism rates amongst the population. This contract extension allows for continued funding for this program. This Transitional Living Program follows the same regulatory requirements as other shelter programs.

The provider has dealt with staff turnover in the last two years, leading to underspending in the salary budget.

HomeRise reports actively working to fill open positions in the coming months as vacancies have increased. Though the program has interviewed for open positions, they cited having issues finding qualified candidates. The agency has an in-house recruiter who looks for candidates both internally and through online job sites, in addition to participating in local job fairs. They have recently hired a Program Director to help facilitate the hiring process. The program states that they plan to have all vacancies filled before the end of the calendar year. HSH is also working with HomeRise to systematically evaluate and revise its budgets (particularly personnel) across programs and ensure that budgets include a staffing structure that directly aligns with program needs.

### Services to be Provided

The purpose of the grant is to provide Transitional Housing and Support Services to TAY. Grantee will provide services to 44 individuals (including 43 in transitional housing, and one legacy tenant who is permanently housed) with a budgeted staff of 12.36 full time equivalent (FTE).

In FY23-24 this program served 51 individuals. This includes 44 SRO style units for individual TAY. The agreement includes 1.40 FTE Janitorial Staff and 1.0 FTE Maintenance Supervisor. Property Management services includes 1.0 FTE Site Manager, 3.50 FTE Front Desk Clerks, and 1.0 FTE Senior Desk Clerk. Support Services includes 1.0 FTE Senior CM, 1.0 Case Manager, and 0.10 Clinical Case Manager. Support services are optional but highly encouraged. Outside of intake and assessment, support services also provide individualized housing focused service plans, employment assistance, transitional housing stability support and life skills training.

<sup>6</sup> The funding sources listed reflect current and future years.



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The amendment standardizes the scope with the amount of time a participant can stay in the program (24 months) and the maximum age limit for participants in the program (25). The addition aligns this program with the age and length of stay requirements that are held by all other TAY Transitional Living Programs under the Temporary Shelter System.

### **Selection**

Grantee was selected through Request for Proposals (RFP) #113, which is valid until June 30, 2029.

### **Performance History**

HomeRise underwent fiscal monitoring most recently in FY23-24. The Final Status Letter for the monitoring included the following findings:

- Subcontractors not authorized by contract.
- Subcontracts not paid per the established schedule in the subcontracting agreement.
- Cost allocation plan does not show consistent and reasonable process for shared program costs.
- Fiscal policies and procedures not reviewed within a year of executive director and/or fiscal manager positions turning over.
- Fiscal policies and procedures missing required topics.
- Unclear whether fiscal policies and procedure implementation demonstrated appropriate internal controls (given that the policies were incomplete).
- No documentation that the procurement / selection of subcontractors followed fiscal policies and procedures.
- No documentation that HomeRise monitored subcontractors for fiscal and programmatic compliance.
- Subcontracts missing required elements (e.g., executed with signatures, current, clear scopes of work).

As a result of fiscal monitoring findings in FY21-22 and FY22-23, the City had placed HomeRise on Elevated Concern status. In April 2024, the City completed an audit of agreements and operations between HomeRise and City funding departments. The audit findings indicated ongoing noncompliance across City grants and agreements attributed to missing key financial controls, inadequate management oversight, and inadequate property finance practices. As of April 2024, and as a result of these audit findings, HomeRise has been escalated from Elevated Concern to Red Flag status. The City Controller and the departments that fund HomeRise developed a comprehensive corrective action plan for HomeRise to address the audit findings and return to compliance.

HSH staff have a biweekly working meeting with HomeRise staff to address all items in the Red Flag Action Plan. This working meeting includes HSH Housing Team members responsible for program and contract compliance and oversight, and HomeRise operations and executive staff. In addition, HSH staff meet biweekly with the HomeRise Executive Team, the Controller's Office, and the Mayor's Office of Housing and Community Development (MOHCD) to review the status of the Red Flag Action Plan items. This cross-departmental work has resulted in a new Financial Policies Manual, Draft Shared Cost Allocation procedures, and an updated/formal approval process for transferring funds between properties. This collaborative work among multiple City Departments and the HomeRise Executive Team will continue until all findings are formally closed out. Through this short-term extension of this



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contract, services to residents can continue uninterrupted while HomeRise actively works to come into compliance with the City.

5<sup>th</sup> & Harrison's Transitional Living Program underwent program monitoring most recently in FY23-24. There were five findings in total and one recommendation. Findings were related to a lack of client service plans and case management notes, and the program's data quality issues with enrollments and exits in the Homeless Management Information System (ONE System). Other findings include poor room turnover time, and vacant rooms. HSH also recommended that the program work collaboratively with the HSH Program Manager to develop a wellness check policy.

**Agreement Materials**

- HOC Approval Package
  - Appendix A, Services to be Provided
  - Appendix B, Budget



**Appendix A, Services to be Provided  
by  
Community Housing Partnership dba HomeRise  
5<sup>th</sup> & Harrison Transitional Living Program**

**I. Purpose of Grant**

The purpose of this grant is to provide transitional housing and support services to the served population. The goals of these services are to stabilize participants' living situations, improve their mental and physical health, and increase their independence, in order to support them in transitioning to permanent housing.

**II. Served Population**

Grantee shall serve Transitional Age Youth (TAY), ages 18 to 24, who are:

- A. Experiencing homelessness; and/or
- B. Marginally housed; and/or
- C. At imminent risk of homelessness.

**III. Referral and Prioritization**

Program participants will be referred by the Department of Homelessness and Supportive Housing (HSH) via the Coordinated Entry System, which organizes the City's Homelessness Response System (HRS) with a common, population-specific assessment, centralized data system, and prioritization method.

**IV. Description of Services**

Grantee shall provide the total number of participants as described in the Appendix B, Budget ("Number Served" tab) at any given time with transitional housing and support services for up to 24 months or until the participant reaches the age of 25, whichever occurs first. Grantee shall provide the following services, including, but not limited to:

- A. Transitional Housing: Grantee shall provide transitional housing. Grantee shall provide services at facilities for which they have site control, meaning a site they own or lease, provided that the site conforms to City requirements. Grantee shall also provide operations services, including, but not limited to, janitorial services in common areas and maintenance and repair of the facility and its systems to maintain a clean and safe environment.
- B. Supportive Services: Grantee shall utilize youth development programming to build strengths and promote resiliency. Support services shall include, but are not limited to, the following:
  1. Outreach: Grantee shall actively engage with participants to provide information about available support services and invite participants to take part. Outreach methods shall include in-person interactions, written messages, phone calls, voice mail, and emails, as available and appropriate to reach participants. Grantee shall document all outreach and attempts.
  2. Intake and Assessment: Grantee shall provide one or more meetings or interviews with each participant to gather required information, identify strengths, skills and needs and to set goals. The assessment shall focus on housing, employment, and education and shall occur within 30 days of placement.

3. Individualized Service Plans: Grantee shall provide Individualized Service Plans to establish and support achievement of goals. Grantee shall document interactions, engagement, and status of participants at least two or more times per month to ensure they are doing well and are receiving the support they need. Participants must actively participate in the development of their Individualized Service Plan.

Grantee shall attempt meaningful engagement with each participant two or more times per month, to assess strengths, skills and needs and match participants with program services most appropriate to help them transition into permanent housing and maximize their well-being.

4. Case Management: Grantee shall provide in-person case management, which includes ongoing meetings and counseling services to support the achievement of Individualized Service Plan goals. Grantee shall document interactions, engagement, and status of participants.
5. Document Readiness: Grantee shall assist guests to become document ready, to obtain needed documentation to support housing options and placement, including, but not limited to uploading/providing the Online Navigation and Entry (ONE) system with copies of the documents to avoid documents being lost or damaged.
6. Employment: Grantee shall provide supervised job search for employment that is subsidized or unsubsidized. Grantee shall assist participants with placement in subsidized employment, such as on-the-job training programs, workshops, or positions subsidized through other government or private funding sources; or unsubsidized jobs.
7. Transitional Housing Stability Support: Grantee shall offer on-site services and/or referrals to all participants who display indications of placement instability. Such indications include, but are not limited to, discontinuance from county, state and federal benefits, rule violations or behavior that puts the participant at risk of a denial of services, conflicts with staff or other participants, and if applicable, warnings from property/program management. Grantee shall assist with the de-escalation and resolution of conflicts as needed.
8. Life Skills Training: Grantee shall provide basic life skills training, which may include, but is not limited to, topics such as budgeting, household finances, conducting a housing search, nutrition, working with landlords, participants' rights, health awareness, and healthcare navigation, and parenting, if applicable.
9. Benefits Advocacy and Assistance: Grantee shall assist participants with obtaining or maintaining benefits. Grantee shall provide referrals for and solve problems preventing participants' enrollment in county, state and federal benefits

programs. Grantee may help participants identify, apply for and establish appointments for available services, such as cash aid, food programs, medical clinics and/or in-home support.

10. Referrals and Coordination of Services: Grantee shall help participants identify and access services available within the community that meet specific needs or support progress toward identified goals, especially those related to education and employment. For example, Grantee shall connect participants with Adult Basic Education, High School Diploma, General Education Degree (GED) preparation, and/or assistance with college preparation, enrollment, and financial aid support and with vocational training and workshops, job development, and job search assistance. This may include providing information about services, calling to help establish appointments, assisting with applications, providing appointment reminders, following up/checking in with participants regarding progress, and, as necessary, re-referral. Grantee shall also communicate and coordinate with outside service providers to support existing linkages that participants may have. Grantee shall refer any participant to an Access Point who has not been assessed by Coordinated Entry.
11. Transportation: Grantee shall provide resources needed to ensure transportation is not a barrier to participant self-sufficiency.
12. Grantee shall assist participants with reasonable accommodations, transfers, and other supports in accordance with HSH policy.
13. De-Escalation and Conflict Resolution: Grantee shall provide support service staff who shall be equipped to respond to emergency situations and are able to provide on-call de-escalation and conflict resolution 24 hours per day, seven days a week.
14. Grantee shall conduct Room Checks, Wellness Checks and/or Emergency Safety Checks regularly to ensure participant health and safety.
15. Support Groups, Social Events and Organized Activities:
  - a. Grantee shall develop a monthly calendar of events and activities with input from tenants to build community engagement, develop peer support, share information, form social connections or to celebrate significant events for approval by HSH. Grantee shall post and provide to tenants the approved monthly calendar of events.
  - b. Grantee shall conduct monthly community meetings for participants.
16. Exit Planning and After-Care Services: Grantee shall start engaging participants in exit planning within 6 months of intake and support successful transitions from the program. This plan shall be created based on the participant's needs and preferences and shall include a plan for the participant's entry into permanent and independent housing. Housing Plans may also include establishing a link to case

management as well as access to services in the community. Grantee shall assist participants in housing searches and applications.

## V. Location and Time of Services

Grantee shall provide support services and transitional housing at 374 5th Street, San Francisco, CA. Grantee shall provide service times when necessary to best serve participants using the staffing outlined in the Appendix B, Budget.

Grantee shall implement policies and procedures pertaining to emergency backup and will train staff accordingly.

## VI. Service Requirements

### A. Facilities

1. Grantee shall maintain facilities in full compliance with requirements of the law and local standards. Grantee shall ensure that facilities are well maintained, clean, and free of pests per the City Integrated Pest Management Code and Environmentally Preferable Purchasing Ordinance. Maintenance shall occur regularly, as required, and janitorial services shall occur regularly, per shift, and as required.
  - a. Grantee shall respond to all facility related requests and complaints promptly and in a manner that ensures the safety of participants and Provider staff. Providers shall note in writing and post in a common area when a maintenance problem of a common area will be repaired and the status of repair.
  - b. Grantee shall develop, maintain, and document maintenance schedules for the facility and its systems, as applicable per facility, including, but not limited to, maintaining light fixtures; heating and air conditioning systems (e.g. fan blades, air registers, vents, filters); plumbing (e.g. drains of showers, toilets, sinks); appliances (e.g. hand dryers, refrigerators, microwaves, fans, etc.); elevators; security systems (e.g. metal detectors, security cameras); fire extinguishers; emergency exits; electrical systems; mold, leak, and pest checks (e.g. roof, walls, bathrooms, kitchen, etc.); and supply checks (e.g. toilet paper, towels, soap, etc.).
  - c. Grantee shall develop, maintain, and document janitorial schedules for the facility and its systems, as applicable, including, but not limited to cleaning floors; restrooms (e.g. floors, tile, showers, toilets, urinals, sinks); laundry machines (e.g. dryer vents); elevators (e.g. buttons, floors, walls); kitchens (e.g. floors, sinks, counters, appliances); water fountains; and heating and air conditioning systems vents.

- B. Harm Reduction: Grantee shall integrate harm reduction principles into service delivery and agency structure as well as follow the HSJ Overdose Prevention Policy. Grantee staff who work directly with participants will participate in annual trainings on harm reduction, overdose recognition and response.



- C. Housing First: Grantee services and operations shall align with the Core Components of Housing First as defined in California Welfare and Institutions Code, section 8255. This includes integrating policies and procedures to provide participant-centered, low-barrier access to housing and services
- D. Language and Interpretation Services: Grantee shall ensure that translation and interpreter services are available, as needed. Grantee shall address the needs of and provide services to the served population who primarily speak language(s) other than English. Additional information on Language Access standards can be found on the HSH Providers Connect website: <https://sfgov1.sharepoint.com/sites/HOM-Ext-Providers>.
- E. Case Conferences. Grantee shall participate in individual case conferences and team coordination meetings with HSH-approved programs, as needed, to coordinate and collaborate regarding participants' progress.
- F. Supervision and Training: Grantee shall provide support services staff with supervision, training and case conferencing, as needed, to ensure appropriate case management, counseling and referral services are provided to tenants. Grantee shall prepare a staff training and budget for approval by HSH.
- G. Admission Policy: Grantee admission policies for services shall be in writing and available to the public. Except to the extent that the services are to be rendered to a specific population as described in the programs listed herein, such policies must include a provision that the served population is accepted for care without discrimination on the basis of race, color, creed, religion, sex, age, national origin, ancestry, sexual orientation, gender identification, disability, or HIV status.
- H. Good Neighbor Policies: Grantee shall maintain a good relationship with the neighborhood, including:
1. Grantee shall work with neighbors, HSH, San Francisco Police Department (SFPD), Department of Public Works (DPW), Department of Public Health (DPH), DEM/Healthy Streets Operations Center (HSOC), and other relevant city agencies to ensure that neighborhood concerns about the facility, site, and perimeter are heard and addressed.
  2. Grantee shall work with neighbors, HSH, SFPD, DPW, DPH, and other relevant city agencies to ensure that neighborhood concerns about the facility are heard and addressed.
  3. Grantee shall assign a director, manager, or representative to participate in and attend relevant neighborhood and community meetings.
  4. Grantee shall provide a phone number to all interested neighbors that will be answered 24 hours a day by a manager or other responsible person who has the authority to respond to complaints and issues at the site as they arise.
  5. Grantee shall minimize the impact on the neighborhood of program guests entering, exiting, or waiting for services. Grantee will do this by limiting referrals

to specified referral partners, not allowing walk-ins, and having 24/7 access to the site for registered guests.

6. Grantee shall actively discourage and address excessive noise from program participants. Grantee will coordinate with other service providers and City agencies, as necessary, to address excessive noise from program participants, including coordination to address excessive noise occurring outside and near the program site.
7. Grantee shall actively discourage loitering and public drug use in the area immediately surrounding the program. Grantee will coordinate with other service providers and City agencies, as necessary, to address this issue.
8. Grantee shall implement management practices necessary to ensure that staff and participants maintain the safety and cleanliness of the area immediately surrounding the facility and do not block driveways of neighboring participant or businesses.
9. Grantee shall take all reasonable measures to ensure the sidewalks adjacent to the facility are not blocked.
10. Grantee will conduct at minimum 3 daily perimeter inspections, collect litter and contact the appropriate city department for assistance when needed.
11. Grantee shall immediately report to SFHOT or HSOC if encampments emerge along the perimeter of the site or immediately across the street.
12. Grantee will actively discourage guests from keeping tents outside of the site on the sidewalk and will follow HSH protocols on the issue.
13. Grantee will abate any graffiti on the site within 24 hours, weather permitting.
14. Grantee will report graffiti in the immediate area to 311.

I. Feedback, Complaint and Follow-up Policies:

Grantee shall provide means for the served population to provide input into the program, including the planning, design, and satisfaction. Feedback methods shall include:

1. Complaint Process: Grantee shall provide a written and posted complaint/concern process that includes various methods for guests to submit an issue (e.g. verbal to staff, written, email) and clear protocols about when and how the guest will get a response.
2. Grantee shall offer and promote a written quarterly survey that has been pre-approved by HSH to the served population to gather feedback, gauge satisfaction and assess the effectiveness of services and systems within the program. Grantee shall offer assistance to the served population regarding completion of the survey in a confidential way if the written format presents any problem.

J. Grievance Procedure:

1. Grantee shall establish and maintain a written Grievance Procedure for participant, which shall include, at minimum, the following elements:
  - a. The name or title of the person or persons authorized to make a determination regarding the grievance;
  - b. The opportunity for the aggrieved party to discuss the grievance with those who will be making the determination;

- c. The amount of time required for each step, including when a participant can expect a response; and
  - d. In accordance with published HSH policies/procedures, the HSH Grievances email address ([hshgrievances@sfgov.org](mailto:hshgrievances@sfgov.org)) and mailing address for the household to contact after the household has exhausted Grantee's internal Grievance Procedure.
2. Grantee shall, at program entry, review and provide a copy of this procedure, and any amendments, to each participant and obtain a signed copy of the form from the participant, which must be maintained in the participant's file. Additionally, Grantee shall post the policy at all times in a location visible to participants and provide a copy of the procedure and any amendments to the assigned HSH Program Manager.
- K. City Communications and Policies  
Grantee shall keep HSH informed and comply with City policies to minimize harm and risk, including:
- 1. Regular communication to HSH about the implementation of the program;
  - 2. Attendance of HSH meetings and trainings, as requested;
  - 3. Adherence to the HSH Shelter Grievance Policy;
  - 4. Attendance at required ADA and access for persons with disabilities trainings;
  - 5. Adherence to the City service/companion/support animal policy; and
  - 6. When applicable, as confirmed with HSH, adherence to the Tuberculosis (TB) Infection Control Guidelines for Homeless. This includes cooperation with the San Francisco TB Prevention and Control Program of the Department of Public Health (DPH).
- L. Critical Incidents: Grantee shall report critical incidents, as defined in the Critical Incident Policy, to HSH, within 24 hours of the incident according to Department policy. Critical incidents shall be reported using the online Critical Incident Report (CIR) form. In addition, critical incidents that involve life endangerment events or major service disruptions should be reported immediately to the HSH program manager. Please refer to the CIR Policy and procedures on the HSH Providers Connect website.
- M. Coordination with Other Service Providers: Grantee shall establish a Memorandum of Understanding (MOU) between all onsite service providers to outline their commitment to collaboration and services provided in the service of participants.
- N. Disaster and Emergency Response Plan: Grantee shall develop and maintain an Agency Disaster and Emergency Response Plan containing Site Specific Emergency Response Plan(s) for each service site per HSH requirements. The Agency Disaster and Emergency Response Plan shall address disaster coordination between and among service sites. Grantee shall update the site plan as needed, and Grantee shall train all employees regarding the provisions of the plan for their sites.

O. Record Keeping and Files:

1. Grantee shall maintain confidential files on the served population, including developed plans, notes, guest agreement, Release of Information (ROI) and progress notes.
2. Grantee shall maintain confidential files for active and previously active guests, and document support service usage.
3. Grantee shall maintain confidential files regarding complaints, grievances, warnings and exits/denials of service for rule infractions including written notices, warnings, exit paperwork and related communications with guests.
4. Grantee shall maintain appropriate documentation to validate the approval of extensions to guests according to HSH policies.
5. Grantee shall maintain all eligibility documentation in the ONE System, including homelessness verification documents and/or ONE system enrollment.

P. Data Standards:

1. Grantee shall ensure compliance with the Homeless Management Information System (HMIS) Participation Agreement and Continuous Data Quality Improvement (CDQI) Process<sup>1</sup>, including but not limited to:
  - a. Entering all client data within three working days (unless specifically requested to do so sooner);
  - b. Ensuring accurate dates for client enrollment, client exit, and client move in (if appropriate); and
  - c. Running monthly data quality reports and correcting errors.
2. Records entered into the ONE system shall meet or exceed the ONE System Continuous Data Quality Improvement Process standards:  
<https://onesf.clarityhs.help/hc/en-us/articles/360001145547-ONE-System-Continuous-Data-Quality-Improvement-Process>.
3. Grantee shall enter data into the ONE System, but may be required to report certain measures or conduct interim reporting in CARBON, via secure email, or through uploads to a File Transfer Protocol (FTP) site. When required by HSH, Grantee shall submit the monthly, quarterly and/or annual metrics into either the CARBON database, via secure email, or through uploads to an FTP site. HSH will provide clear instructions to all Grantee regarding the correct mechanism for sharing data. Changes to data collection or reporting requirements shall be communicated to Grantee via written notice at least one month prior to expected implementation.
4. Any information shared between Grantee, HSH, and other providers about program participants shall be communicated in a secure manner, with appropriate release of consent forms and in compliance with 24 C.F.R. Part 578, Continuum of Care; 45 C.F.R. Parts 160 and 164, the Health Insurance Portability and Accountability Act (HIPAA) and federal and state data privacy and security guidelines.

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<sup>1</sup> HMIS Participation Agreement and Continuous Data Quality Improvement Process, available here:  
<https://hsh.sfgov.org/get-information/one-system/>

5. Failure to comply with data security, storage and access requirements may result in loss of access to the HMIS and other data systems.

## **VI. Service Objectives**

Grantee shall achieve the Service Objectives listed below.

- A. Grantee shall actively outreach to 100 percent of households at least once every month.
- B. Grantee shall offer assessment to 100 percent of households for primary medical care, mental health and substance use treatment needs within 60 days of move-in.
- C. Grantee shall offer assessment to 100 percent of households for benefits within 60 days of move-in, and shall assist residents to apply for benefits for which they are eligible.
- D. Grantee shall offer Support Services to 100 percent of all households who showed housing instability (e.g., non-payment of rent, lease violations) at least once per incident.
- E. Grantee shall outreach to 100 percent of households with planned exits from the program to engage in comprehensive discharge planning, which includes referrals for case management, housing, food, clothing, medical treatment, detox, and/or other services as necessary and appropriate.
- F. Grantee shall outreach to 100 percent of program participants participating in Support Services to create/engage in Service Plans, as needed, on an ongoing basis.
- G. Grantee shall review Service Plans at least once every six months and update as appropriate at this time.
- H. Grantee shall administer an annual written anonymous survey of households to obtain feedback on the type and quality of program services. Grantee shall offer all households the opportunity to take this survey.

## **VII. Outcome Objectives**

Grantee shall achieve the Outcome Objectives listed below.

- A. 90 percent of households will maintain their housing for a minimum of 12 months, move to other permanent housing, or be provided with more appropriate placements.
- B. 80 percent of individualized service plans will be reviewed at least once every six months and updated as appropriate at this time.
- C. 85 percent of participants have at least one positive relationship and/or permanent connection with an adult to whom they can go for support, advice, and guidance;
- D. 90 percent of participants will be engaged in education or employment activities while in the program;

- E. 80 percent of participants who exit will be employed or enrolled in post-secondary education; and
  - 1. 70 percent of participants exiting the program will exit to stable housing.
  - 2. 80 percent of households completing an annual tenant satisfaction survey will be satisfied or very satisfied with program services (based on a four-point scale: 1 = very dissatisfied, 2 = dissatisfied, 3 = satisfied, 4 = very satisfied).

### **VIII. Reporting Requirements**

Grantee shall input data into systems required by HSH, such as the ONE system and CARBON.

- A. For any quarter that maintains less than 90 percent of the total agreed upon units of service for any mode of service hereunder, Grantee shall immediately notify the Department in writing and shall specify the number of underutilized units of service.
- B. Grantee shall report vacancy and referral information to HSH weekly in the form specified by HSH until such a time that an inventory tracker is available in ONE.
- C. Reporting via HSH designated method the current pool of active guests, the number of occupied beds, the number of beds temporarily offline and the number of beds currently available for placement.
- D. Grantee shall provide a monthly, quarterly, and annual report of activities, referencing the tasks as described in the Service and Outcome Objectives sections. Grantee shall enter the monthly metrics in the CARBON database by the 15<sup>th</sup> of the following month, including:
  - 1. Occupancy;
  - 2. New move-ins;
  - 3. Exits; and
  - 4. The number of unduplicated case manager contacts.
- E. Grantee shall provide an annual report summarizing the contract activities, referencing the tasks as described in the Service and Outcome Objectives sections. This report shall also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15<sup>th</sup> of the month following the end of the program year.
- F. Grantee shall provide Ad Hoc reports as required by the Department and respond to requests by the Department in a timely manner.
- G. Grantee shall participate, as required by Department, with City, State and/or Federal government evaluative studies designed to show the effectiveness of Grantee's services. Grantee agrees to meet the requirements of and participate in the evaluation program and management information systems of the City. The City agrees that any final reports generated through the evaluation program shall be made available to

Contractor within thirty working days of receipt of any evaluation report and such response will become part of the official report.

- H. Grantee shall submit Project Descriptor data elements as described in the U.S. Department of Housing and Urban Development (HUD)'s latest HMIS Data Standards Manual (<https://files.hudexchange.info/resources/documents/HMIS-Data-Standards-Manual.pdf>) to HSH at the following intervals: 1) at the point of project setup; 2) when project information changes; 3) at least annually or as requested by HSH. Data is used for reporting mandated by HUD and California's Interagency Council on Homelessness, and to ensure HSH's ongoing accurate representation of program and inventory information for various reporting needs, including monitoring of occupancy and vacancy rates.

For assistance with reporting requirements or submission of reports, contact the assigned Contract and Program Managers.

## **IX. Monitoring Activities**

- A. Program Monitoring: Grantee is subject to program monitoring and/or audits, such as, but not limited to, review of the following: participant files, the Grantee's administrative records, staff training documentation, postings, program policies and procedures, data reported on Annual Performance Reports (APR), documentation of funding match sources, Disaster and Emergency Response Plan and training, personnel and activity reports, proper accounting for funds and other operational and administrative activities, and back-up documentation for reporting progress towards meeting service and outcome objectives.

Monitoring of program participation in the ONE system may include, but is not limited to, data quality reports from the ONE system, records of timeliness of data entry, and attendance records at required training and agency lead meetings.

- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal and accounting policies, 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 Memoranda of Understanding (MOUs), and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D	G	H	K	N	Q	T	U	V	W	X	Y	AI	AJ	AK	
1	DEPARTMENT OF HOMELESSNESS AND SUPPORTIVE HOUSING																		Page 1 of 6
2	APPENDIX B, BUDGET																		
3	Document Date	12/1/2024																	
4	Contract Term	Begin Date	End Date	Duration (Years)															
5	Current Term	7/1/2019	6/30/2025	6															
6	Amended Term	7/1/2019	12/31/2025	7															
7	Provider Name	Community Housing Partnership (dba)																	
8	Program	5th & Harrison Transitional Living Program																	
9	FSP Contract ID#	1000013599																	
10	Action (select)	Amendment																	
11	Effective Date	12/1/2024																	
12	Budget Name	General Fund - Transitional Housing and Support Services																	
13		Current	New																
14	Term Budget	\$ 9,993,270	\$ 12,414,049	15%															
15	Contingency	\$ 0	\$ 528,025																
16	Not-To-Exceed	\$ 9,993,270	\$ 12,942,074																
17	EXTENSION YEAR																		
18		Year 1	Year 2	Year 3	Year 4	Year 5	Year 6			Year 7			All Years						
19		7/1/2019 - 6/30/2020	7/1/2020 - 6/30/2021	7/1/2021 - 6/30/2022	7/1/2022 - 6/30/2023	7/1/2023 - 6/30/2024	7/1/2024 - 6/30/2025	7/1/2024 - 6/30/2025	7/1/2024 - 6/30/2025	7/1/2025 - 12/31/2025	7/1/2025 - 12/31/2025	7/1/2025 - 12/31/2025	7/1/2019 - 6/30/2025	7/1/2019 - 12/31/2025	7/1/2019 - 12/31/2025				
20		Actuals	Actuals	Actuals	Actuals	Actuals	Current	Amendment	New	Current	Amendment	New	Current/Actuals	Amendment	New				
21	Expenditures																		
22	Salaries & Benefits	\$ 708,408	\$ 704,152	\$ 841,139	\$ 902,426	\$ 1,013,943	\$ 1,025,924	\$ (41,765)	\$ 984,159	\$ -	\$ 492,080	\$ 492,080	\$ 5,195,992	\$ 450,315	\$ 5,646,307				
23	Operating Expense	\$ 795,350	\$ 799,606	\$ 744,857	\$ 980,598	\$ 902,405	\$ 890,426	\$ (645,280)	\$ 245,146	\$ -	\$ 122,573	\$ 122,573	\$ 5,113,241	\$ (522,707)	\$ 4,590,534				
24	Subtotal	\$ 1,503,757	\$ 1,503,757	\$ 1,585,996	\$ 1,883,024	\$ 1,916,348	\$ 1,916,350	\$ (687,045)	\$ 1,229,305	\$ -	\$ 614,653	\$ 614,653	\$ 10,309,233	\$ (72,392)	\$ 10,236,841				
25	Indirect Percentage	15.00%	15.00%	15.00%	15.00%	15.00%	15.00%		15.00%	15.00%		15.00%							
26	Indirect Cost (Line 24 X Line 25)	\$ 225,563	\$ 225,563	\$ 237,899	\$ 282,457	\$ 287,452	\$ 287,452	\$ (103,057)	\$ 184,396	\$ -	\$ 92,198	\$ 92,198	\$ 1,546,386	\$ (10,859)	\$ 1,535,527				
27	Other Expenses (Not subject to indirect %)	\$ (39,326)	\$ (162,644)	\$ 118,448	\$ (335,617)	\$ (338,794)	\$ (1,104,417)	\$ 2,037,492	\$ 933,075	\$ -	\$ 466,538	\$ 466,538	\$ (1,862,350)	\$ 2,504,030	\$ 641,680				
28	Capital Expenditure	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -				
30	Total Expenditures	\$ 1,689,994	\$ 1,566,676	\$ 1,942,344	\$ 1,829,863	\$ 1,865,007	\$ 1,099,385	\$ 1,247,391	\$ 2,346,776	\$ -	\$ 1,173,388	\$ 1,173,388	\$ 9,993,269	\$ 2,420,779	\$ 12,414,048				
31																			
32	HSH Revenues (select)																		
33	General Fund - Ongoing	\$ 1,729,320	\$ 1,734,552	\$ 1,843,874	\$ 2,180,480	\$ 2,304,333	\$ 2,346,776		\$ 2,346,776	\$ -	\$ 1,173,388	\$ 1,173,388	\$ 12,139,335	\$ 1,173,388	\$ 13,312,723				
35	General Fund - One-Time	\$ -	\$ -	\$ 51,880					\$ -	\$ -	\$ -	\$ -	\$ 51,880	\$ -	\$ 51,880				
36	Prop C - One-Time COVID-19 Bonus Pay	\$ -	\$ -	\$ 100,993					\$ -	\$ -	\$ -	\$ -	\$ 100,993	\$ -	\$ 100,993				
37	COVID-19 Time-Limited Funding	\$ 12,000							\$ -	\$ -	\$ -	\$ -	\$ 12,000	\$ -	\$ 12,000				
38	Adjustment to Actuals	\$ (51,326)	\$ (167,876)	\$ (54,403)	\$ (350,617)	\$ (439,325)			\$ -	\$ -	\$ -	\$ -	\$ (1,063,547)	\$ -	\$ (1,063,547)				
39	Pending Amendment - Above NTE	\$ -					\$ (1,247,391)	\$ 1,247,391	\$ -	\$ -	\$ -	\$ -	\$ (1,247,391)	\$ 1,247,391	\$ -				
40		\$ -							\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -				
42	Total HSH Revenues	\$ 1,689,994	\$ 1,566,676	\$ 1,942,344	\$ 1,829,863	\$ 1,865,008	\$ 1,099,385	\$ 1,247,391	\$ 2,346,776	\$ -	\$ 1,173,388	\$ 1,173,388	\$ 9,993,270	\$ 2,420,779	\$ 12,414,049				
52	Rev-Exp (Budget Match Check)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -				
53																			
54																			
55	Prepared by	Karen Erickson																	
56	Phone	415-225-4959																	
57	Email	<a href="mailto:kerickson@HomeRiseSF.org">kerickson@HomeRiseSF.org</a>																	
58		*NOTE: HSH budgets typically project out revenue levels across multiple years, strictly for budget-planning purposes. All program budgets at any given year are subject to Mayor / Board of Supervisors discretion and funding availability, and are not guaranteed. For further information, please see Article 2 of the G-100 Grant Agreement document.																	
59	Template last modified	5/13/2022																	
60																			





	A	B	E	H	K	N	Q	R	S	V	AF	AG	AH
1	DEPARTMENT OF HOMELESSNESS AND SUPPORTIVE HOUSING												Page 3 of 6
2	OPERATING DETAIL												
3	Document Date	12/1/2024											
4	Provider Name	Community Housing Partnership (dba HomeRise)											
5	Program	5th & Harrison Transitional Living Program											
6	FSP Contract ID#	1000013599											
7	Budget Name	General Fund - Transitional Housing and Support Services											
8		EXTENSION											
9		Year 1	Year 2	Year 3	Year 4	Year 5	Year 6			Year 7	All Years		
10		7/1/2019 - 6/30/2020	7/1/2020 - 6/30/2021	7/1/2021 - 6/30/2022	7/1/2022 - 6/30/2023	7/1/2023 - 6/30/2024	7/1/2024 - 6/30/2025	7/1/2024 - 6/30/2025	7/1/2024 - 6/30/2025	7/1/2025 - 12/31/2025	7/1/2019 - 6/30/2025	7/1/2019 - 12/31/2025	7/1/2019 - 12/31/2025
11		Actuals	Actuals	Actuals	Actuals	Actuals	Current	Amendment	New	New	Current/Actuals	Amendment	New
12	Operating Expenses	Budgeted Expense	Budgeted Expense	Budgeted Expense	Budgeted Expense	Budgeted Expense	Budgeted Expense	Change	Budgeted Expense	Budgeted Expense	Budgeted Expense	Change	Budgeted Expense
13	Rental of Property	\$ 580,434	\$ 598,036	\$ 609,977	\$ 710,396	\$ 606,595	\$ 645,280	\$ (645,280)	\$ -	\$ -	\$ 3,750,718	\$ (645,280)	\$ 3,105,438
14	Utilities(Elec, Water, Gas, Phone, Scavenger)	\$ 76,405	\$ 59,133	\$ 24,652	\$ 51,406	\$ 76,000	\$ 48,000	\$ -	\$ 48,000	\$ 24,000	\$ 335,596	\$ 24,000	\$ 359,596
15	Office Supplies, Postage	\$ 9,215	\$ 33,478	\$ 4,521	\$ 6,200	\$ 6,200	\$ 6,200	\$ -	\$ 6,200	\$ 3,100	\$ 65,814	\$ 3,100	\$ 68,914
16	Building Maintenance Supplies and Repair	\$ 22,016	\$ 7,522	\$ 27,000	\$ 49,600	\$ 80,000	\$ 72,336	\$ -	\$ 72,336	\$ 36,168	\$ 258,474	\$ 36,168	\$ 294,642
18	Insurance	\$ 26,142	\$ 550	\$ 25,685	\$ 19,120	\$ 22,185	\$ 22,185	\$ -	\$ 22,185	\$ 11,093	\$ 115,867	\$ 11,093	\$ 126,960
19	Staff Training	\$ 11,841	\$ 22,623	\$ 6,382	\$ 18,600	\$ 12,500	\$ 12,500	\$ -	\$ 12,500	\$ 6,250	\$ 84,446	\$ 6,250	\$ 90,696
20	Staff Travel-(Local & Out of Town)	\$ 800	\$ 800	\$ 575	\$ 775	\$ 775	\$ 775	\$ -	\$ 775	\$ 388	\$ 4,500	\$ 388	\$ 4,888
21	Rental of Equipment	\$ 3,146	\$ 3,725	\$ 3,500	\$ 3,240	\$ 3,240	\$ 3,240	\$ -	\$ 3,240	\$ 1,620	\$ 20,091	\$ 1,620	\$ 21,711
24	Office Equipment	\$ 15,770	\$ 19,000	\$ -	\$ -	\$ 5,000	\$ -	\$ -	\$ -	\$ -	\$ 39,770	\$ -	\$ 39,770
25	IT and Small Office Purchase	\$ 5,859	\$ 6,000	\$ 4,000	\$ 8,500	\$ 6,000	\$ 6,000	\$ -	\$ 6,000	\$ 3,000	\$ 36,358	\$ 3,000	\$ 39,358
26	Organizational Activities (Staff)	\$ 3,577	\$ 1,969	\$ 100	\$ 2,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 7,646	\$ -	\$ 7,646
27	Tenant/Program projects/activity supplies	\$ 10,450	\$ 16,450	\$ 10,465	\$ 21,525	\$ 15,200	\$ 10,200	\$ -	\$ 10,200	\$ 5,100	\$ 84,290	\$ 5,100	\$ 89,390
29	Dues and Subscriptions	\$ -	\$ 6,000	\$ 3,000	\$ 6,500	\$ 6,500	\$ 6,500	\$ -	\$ 6,500	\$ 3,250	\$ 28,500	\$ 3,250	\$ 31,750
32						\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
42	Consultants						\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
43						\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
54	Subcontractors (First \$25k Only)						\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
55	Maintenance Contractors	\$ 7,532	\$ 2,000	\$ -	\$ 8,736	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 18,268	\$ -	\$ 18,268
56	Extermination Contract	\$ 6,000	\$ 7,320	\$ -	\$ 10,000	\$ 10,000	\$ 10,000	\$ -	\$ 10,000	\$ 5,000	\$ 43,320	\$ 5,000	\$ 48,320
57	Temp Desk Clerk/Lobby Security	\$ 13,000	\$ 15,000	\$ -	\$ 25,000	\$ 30,000	\$ 25,000	\$ -	\$ 25,000	\$ 12,500	\$ 108,000	\$ 12,500	\$ 120,500
58	Professional Services	\$ -	\$ -	\$ 25,000	\$ 14,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 39,000	\$ -	\$ 39,000
59	Contractors Janitorial				\$ 25,000	\$ 22,210	\$ 22,210	\$ -	\$ 22,210	\$ 11,105	\$ 69,420	\$ 11,105	\$ 80,525
67										\$ -			
68	TOTAL OPERATING EXPENSES	\$ 795,350	\$ 799,606	\$ 744,857	\$ 980,598	\$ 902,405	\$ 890,426	\$ (645,280)	\$ 245,146	\$ 122,573	\$ 5,113,241	\$ (522,707)	\$ 4,590,534
69													
70	Other Expenses (not subject to indirect cost %)												
71	Unallocated funds - must be allocated before billing		\$ 5,232	\$ 2,605		\$ 100,531	\$ 142,974	\$ 183,506	\$ 326,480	\$ 163,240	\$ 251,342	\$ 346,746	\$ 598,088
72	One-Time FY20-21 General Fund Carryforward			\$ 51,880			\$ -	\$ -	\$ -	\$ -	\$ 51,880	\$ -	\$ 51,880
73	Prop C One-Time COVID-19 Bonus Pay			\$ 100,994			\$ -	\$ -	\$ -	\$ -	\$ 100,994	\$ -	\$ 100,994
74	Professional Services - see similar line above in Subcontractor section			\$ 17,372			\$ -	\$ -	\$ -	\$ -	\$ 17,372	\$ -	\$ 17,372
75	Temp Desk Clerk/Lobby Security				\$ 10,000		\$ -	\$ -	\$ -	\$ -	\$ 10,000	\$ -	\$ 10,000
76	Contractors Janitorial				\$ 5,000		\$ -	\$ -	\$ -	\$ -	\$ 5,000	\$ -	\$ 5,000
77	Adjustment to Actuals	\$ (51,326)	\$ (167,876)	\$ (54,403)	\$ (350,617)	\$ (439,325)	\$ -	\$ -	\$ -	\$ -	\$ (1,063,547)	\$ -	\$ (1,063,547)
78	COVID-19 Time-Limited Funding	\$ 12,000					\$ -	\$ -	\$ -	\$ -	\$ 12,000	\$ -	\$ 12,000
79	Hold Pending Amendment - Above NTE						\$ (1,247,391)	\$ 1,247,391	\$ -	\$ -	\$ (1,247,391)	\$ 1,247,391	\$ -
80	Rental of Site (master lease)						\$ 606,595	\$ 606,595	\$ 303,298	\$ -	\$ 909,893	\$ 909,893	\$ 909,893
81							\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
82													
83	TOTAL OTHER EXPENSES	\$ (39,326)	\$ (162,644)	\$ 118,448	\$ (335,617)	\$ (338,794)	\$ (1,104,417)	\$ 2,037,492	\$ 933,075	\$ 466,538	\$ (1,862,350)	\$ 2,504,030	\$ 641,680
93													
94	TOTAL CAPITAL EXPENSES	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
95													
96	HSH #3												Template last modified 5/13/2022

**BUDGET NARRATIVE**

Fiscal Year

**General Fund - Transitional Housing and Support Services**

FY24-25

<- Select from the drop-down list the fiscal year in which the proposed budget changes will first become effective

	<u>Adjusted</u>		<u>Justification</u>	<u>Calculation</u>	<u>Employee Name</u>
	<u>Budgeted</u>	<u>Budgeted</u>			
<u>Salaries &amp; Benefits</u>	<u>FTE</u>	<u>Salary</u>			
Program Director	0.50	\$ 53,000	Directly supervises all APDs/Resident Services Managers to ensure high levels of program service and contract compliance.	Annualized Salary * Adjusted FTE	Vacant
Site Manager	1.00	\$ 79,700	The Site Manager maintains an environment of respect and service, while ensuring that residents abide by the house rules and program terms. Responsible for monitoring the physical integrity of the building and working with maintenance staff to address any deficiencies. Works in close coordination with Resident Services to collect program participant fees and savings contribution and collect tenant rent. The SM alternates on-call responsibilities during non-scheduled hours to respond to building and/or resident emergencies.	Annualized Salary * Adjusted FTE	Jackson, Deborah
Clinical Case Manager	0.10	\$ 7,696	Master's Level clinician provides mental health treatment, crisis intervention and consultation; facilitates 5150s; and supports achievement of agency-wide housing retention and Resident Services Department goals.	Annualized Salary * Adjusted FTE	Vacant
Front Desk Clerk	3.50	\$ 160,160	Monitor daily building activities, provide 24-hour security, and respond to building and resident emergencies.	Annualized Salary * Adjusted FTE	Trocki, Robert; Page, Marquita, Byrd, Annie; Yaqueline Hernandez
Senior Front Desk Clerk	1.00	\$ 60,200	Responsible for the operations of the building's desk station, including oversight and scheduling of the front desk clerk staff, training of staff on all emergency, and non-emergency procedures, and compliance with all departmental, and agency policies (high school diploma or GED required).	Annualized Salary * Adjusted FTE	Robin Antoinette Boyer
Maintenance Supervisor	1.00	\$ 63,400	Responsible for ongoing maintenance and turnovers, oversight of all vendor repairs, and development and implementation of Preventive Maintenance Plans	Annualized Salary * Adjusted FTE	Vacant
Janitor	1.40	\$ 66,976	Responsible for maintaining the cleanliness and janitorial standards at the site.	Annualized Salary * Adjusted FTE	Rita Zamora-Fee, Mark Collins
Resident Services Manager	1.00	\$ 71,500	Provides program oversight and supervises on-site staff (Note: our program model requires that there is coverage for crisis intervention and cross training across the portfolios ensuring consistency within the department leadership and preventing gaps in coverage.)	Annualized Salary * Adjusted FTE	Vacant
Director of Contracts and Compliance	0.15	\$ 18,300	Supports the site-level staff to ensure that contract compliance is met, including all funder reporting. Identifies training opportunities for staff to ensure high level documentation and data collection of services provided. Leads Town Hall planning and implementation, including site level report outs of resident experience shared; supports staff follow up to ensure resident voice is centered in programmatic CQI.	Annualized Salary * Adjusted FTE	Spiker, Kat
Director of Resident Services	0.15	\$ 19,200	Directs and guides the overall delivery of building-based services for tenants at supportive housing sites, including case management, community-building, and on-site behavioral health services to over 1,300 tenants; ensures compliance with funder requirements, including fiscal oversight and reporting; provides clinical supervision, crisis intervention and facilitates 5150's as needed.	Annualized Salary * Adjusted FTE	Davis Sr., Marcel
Resident Services Program Associate	0.15	\$ 9,672	Provides administrative support directly to sites (including soliciting and distributing in kind donations offered to residents (i.e. new bedding, clothing, personal care items) and coordinates all staff training (identifies and vets new trainers for fit with PSH/HomeRise, coordinates logistics, ensures training space and time meet staff needs).	Annualized Salary * Adjusted FTE	Ballard, Brittany (Shrag)
Resident Services Training Manager	0.10	\$ 6,970	Provides onboarding, coaching, and mentoring to new RSTL and RSC staff; provides direct service coverage during scheduled PTO of regular staff.	Annualized Salary * Adjusted FTE	Scannell, Alex
Senior Case Manager	1.00	\$ 60,350	Provides case management services to residents, supports achievement of agency-wide housing retention and Resident Services Department goals, supports staff to ensure they have the support needed to carry out the work. Staffing pattern is 1.0 FTE, however was adjusted to .75 due to staff vacancies. Adjusted again in March to .35 due to continued vacancy.	Annualized Salary * Adjusted FTE	Rice, Scott
Case Manager	1.00	\$ 60,350	Provides case management services to residents, supports achievement of agency-wide housing retention and Resident Services Department goals, supports staff to ensure they have the support needed to carry out the work. Staffing pattern is 1.0 FTE, however was adjusted to .9 due to staff vacancies. Adjusted again in March to .4 due to continued vacancy.	Annualized Salary * Adjusted FTE	Vacant; position to be posted
<b>TOTAL</b>	<b>12.05</b>	<b>\$ 737,474</b>			
<u>Employee Fringe Benefits</u>		<u>\$ 246,685</u>	<u>Includes FICA, SSUI, Workers Compensation and Medical calculated at 33.45% of total salaries.</u>		
<b>Salaries &amp; Benefits Total</b>		<b>\$ 984,159</b>			

<u>Operating Expenses</u>	<u>Budgeted Expense</u>	<u>Justification</u>	<u>Calculation</u>
Rental of Property	\$ -		
Utilities(Elec, Water, Gas, Phone, Scavenger)	\$ 48,000	Utilities (gas, water, electric), including telecommunications	
Office Supplies, Postage	\$ 6,200	Office supplies & postage	
Building Maintenance Supplies and Repair	\$ 72,336	Includes costs for ongoing building maintenance and repair work, including unit turnover expenses, security alarm maintenance, cameras, fire sprinkler and fire system maintenance	
Insurance	\$ 22,185	For insurance expense - property and allocated	
Staff Training	\$ 12,500	For direct program staff training, recruitment, background checks, and retention activities. Trainings focus on annual trainings required for all RSD staff, individual development opportunities based on staff need and interest, leadership development opportunities as staff move into supervisory or mentorship roles, and department off-site opportunities for team building and learning outside of their regular site. Please see the HSH approved HomeRise Staff Development plan 7.22 for further details.	
Staff Travel-(Local & Out of Town)	\$ 775	For travel expense to meetings, trainings, etc.	
Rental of Equipment	\$ 3,240	For copier lease and maintenance of copier rental, including allocated expense.	
IT and Small Office Purchase	\$ 6,000	For IT direct expenses, including purchase of computer, printers, as well as allocated expenses for IT support.	
Tenant/Program projects/activity supplies	\$ 10,200	Supports monthly groups events, and celebrations, including resident determined programming through the Resident Association. Each building has its own calendar that meets the building's needs and includes community building events (coffee hour and community meetings), skill building/wellness events (harm reduction groups, parenting groups, cooking groups), and seasonal and cultural celebrations (Black History Month, Pride, Cesar Chavez day, Thanksgiving, Winter holidays). In addition to programming, this line items covers items that support housing retention and wellness such as backpacks and school supplies for school-aged youth, covers emergency resources if a tenant needed to be temporarily displaced from their unit, as well as provides cleaning supplies for tenants addressing habitability issues or pest infestations. Welcome baskets for new move-ins and new home supplies for residents who move into less supported housing are included in this budget, as well as food and supplies for pets/service animals.	
Dues and Subscriptions	\$ 6,500	For license fees associated with the ECM case management system used by the resident service department to document resident data, as well as fees for the Property Management software (Yardi).	
<b>Subcontractors (First \$25k Only)</b>	\$ -		
Extermination Contract	\$ 10,000	Previously included in Professional Services: Monthly pest inspection and extermination costs	
Temp Desk Clerk/Lobby Security	\$ 25,000	Previously included in Professional Services; Shift coverage provided to Front Desk Clerk staff during times of staff vacation or shift called outs	
Contractors Janitorial	\$ 22,210	Previously included in Professional Services; Shift coverage provided for janitorial staff during times of staff vacation or shift called outs	
<b>TOTAL OPERATING EXPENSES</b>	<b>\$ 245,146</b>		
<b>Indirect Cost</b>	15.0% <b>\$ 184,396</b>		

<u>Other Expenses (not subject to indirect cost %)</u>	<u>Amount</u>	<u>Justification</u>	<u>Calculation</u>
Unallocated funds - must be allocated before billing	\$ 326,480	Unallocated cost of doing business (CODB) increase and funds released from indirect and previous staff positions (see calculation note at right). Not available for billing until allocated to budget lines and approved by the HSH Program Manager.	Annual percentage approved by the SF Board of Supervisors - includes 4.75% increase in FY23-24 (\$100,531) and 2.5% increase on eligible costs (excluding rent) in FY24-25 (\$42,443). Also includes \$135,447 released from indirect when the rent was moved from operating to other costs, and \$48,029 from positions removed from the budget.
Rental of Site (master lease)	\$ 606,595	Annual master lease cost to rent the 5th and Harrison property - previously included under operating costs above; moved here for consistency with treatment of master leasing costs in City budgets	\$50,549.58 monthly cost per lease
	\$ -		
<b>TOTAL OTHER EXPENSES</b>	<b>\$ 933,075</b>		



	A	B	C	D	E
1	<b>DEPARTMENT OF HOMELESSNESS AND SUPPORTIVE HOUSING</b>				<b>Page 6 of 6</b>
2	<b>APPENDIX B, BUDGET</b>				
3	<b>Document Date</b>	12/1/2024			
4	<b>Contract Term</b>	<b>Begin Date</b>	<b>End Date</b>	<b>Duration (Years)</b>	
5	<b>Current Term</b>	7/1/2019	6/30/2025	6	
6	<b>Amended Term</b>	7/1/2019	12/31/2025	7	
7	<b>Program</b>	5th & Harrison Transitional Living Program			
8					
9	<b>Approved Subcontractors</b>				
10	Pacific Coast Staffing				
11	Janitorial Contractor				
12	Extermination service				
13					
14					
15					
16					
17					
18					
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25					