



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>	April 4, 2024
<b>Subject</b>	Grant Agreement Approval: Compass Family Services   SF HOME Rapid Rehousing

<i>Agreement Information</i>	
<b>F\$P Contract ID#</b>	1000032115
<b>Provider</b>	Compass Family Services
<b>Program Name</b>	SF HOME Rapid Rehousing
<b>Agreement Action</b>	Original Agreement
<b>Agreement Term</b>	July 1, 2024 – June 30, 2027

**Agreement Amount**

<b>New Budget</b>	<b>Contingency<sup>1</sup></b>	<b>Total Not to Exceed (NTE)</b>
\$7,605,228	\$1,521,046	\$9,126,274

<i>Funding Information</i>	
<b>Funding Sources</b>	72% General Fund 28% Our City, Our Home (Prop C)

The Department of Homelessness and Supportive Housing (HSH) Contracts team requests authorization to enter into a new grant agreement with Compass Family Services for the provision of SF HOME Rapid Rehousing for the period of July 1, 2024 to June 30, 2027. This agreement continues funding of the Rapid Rehousing service component at current levels for three additional performance years upon expiration of the current agreement.<sup>2</sup>

**Background**

The Compass Family Services SF HOME Rapid Rehousing program has provided rapid rehousing services to 44 households with minor children since 2018. This request is to renew the existing grant agreement to continue providing rapid rehousing services. Rapid Rehousing programs provide time-limited, rental subsidies for use in private market. Throughout the program Compass Family Services provides ongoing

<sup>1</sup> A 20 percent contingency applied to the agreement budget amount.

<sup>2</sup> This program is currently funded under Contract ID# 1000019041, which was procured under the authority of Request for Qualifications (RFQ) 127 for Emergency Solutions Grant (ESG) services. Because this federal ESG funding in the agreement budget was discontinued and backfilled with local funding, RFQ 127 is no longer an appropriate procurement authority for this program. This new agreement reprocures the services under Emergency Ordinance 61-19, with inapplicable references to ESG funding requirements removed.

*Grant Agreement Approval: Compass Family Services | SF HOME Rapid Rehousing*

case management, linkages to workforce development opportunities and other stabilization resources. Compass Family Services assists households with removing barriers to housing, housing location, housing coordination, landlord liaison services, subsidy administration and housing focused case management.

In 2022, Compass Family Services received funding to administer up to 12 months of extension beyond the time-limited 24-month rapid rehousing program. This grant agreement includes funding to continue offering the subsidy extensions.

**Services to be Provided**

The purpose of the grant is to provide Rapid Rehousing services, including housing location, housing coordination, landlord liaison services, subsidy administration and housing focused case management to 44 households with custody of a minor child. The program budget supports 11.85 full time equivalent (FTE) staff in FY 24-25, transitioning to 9.96 FTE in FY 25-26 and FY 26-27 due to expected change in programmatic need.

**Selection**

The Board of Supervisors adopted Ordinance No. 61-19, which authorizes HSH to enter into and amend contracts and grants without adhering to the Administrative Code provisions regarding requirements for construction work, procurement, and personal services related to the shelter crisis, which is valid until May 2024, or until the Point In Time (PIT) count is at 5,350. Compass Family Services was selected for provision of these services based on the organization's experience and ability to begin services in a timely manner. Compass Family Services has been providing services for SF HOME Rapid Rehousing since July 1, 2020.

**Performance History**

Compass Family Services underwent fiscal monitoring most recently in FY 22-23 and there were no unresolved findings.

Compass Family Services underwent program monitoring most recently in February 2024, during which time the SF HOME Rapid Rehousing program's FY 22-23 performance was monitored. Compass Family Services received three findings in the areas of "Program Management and Oversight," "Service Provision," and "HMIS Reporting." These findings were administrative and did not disrupt or hinder the scope of services being delivered. Compass Family Services was given 30 business days to respond to these findings, which are due on April 5, 2024.



**Appendix A, Services to be Provided**  
**By**  
**Compass Family Services**  
**Rapid Rehousing**

**I. Purpose of Grant**

The purpose of the grant is to provide short-to-medium term Rapid Rehousing (RRH) to the served population. The goals of these services are to reduce the length of time participants spend experiencing homelessness, support the served population in retaining their housing and exiting to rent stability.

**II. Served Population**

Grantee shall serve formerly homeless or at-risk of homelessness and income-eligible family households with an adult and at least one natural, adoptive and/or foster child below the age of 18. This may include a pregnant person, with or without a partner.

**III. Referral and Prioritization**

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

**IV. Description of Services**

Grantee shall provide Support Services to the total number participants as listed in Appendix B, Budget ("Number Served" tab). RRH services are voluntary and shall be available to all participants. Support Services shall include, but are not limited to, the following:

- A. Housing-Focused Case Management Services: Grantee shall provide necessary services to ensure a seamless transition to permanent housing. Housing-Focused Case Management services shall include assisting participants with securing needed documentation to move into housing, referrals to mainstream resources, and working closely with RRH administrator(s) to ensure that all needed services are in place prior to housing placement. Grantee shall provide wrap-around case management services within a Harm Reduction model to ensure participants' long-term housing retention and improved well-being. These services shall include, but are not limited to, the following:
1. Grantee shall communicate and coordinate with Coordinated Entry and housing partners to remove any barriers to the housing referral process;
  2. Grantee shall facilitate onboarding and provide written documentation to inform participants of program components, including program overview, engagement, and services overview, rent contribution explanation, subsidy termination overview, grievance policy, and reasonable accommodation process;
  3. Grantee shall work collaboratively with participants to develop an initial Housing Stability Plan, which shall be updated on a quarterly basis, at minimum. The Housing Stability Plan shall outline participant plans to secure and sustain housing, inclusive of specific, actionable steps the participant will take to pursue housing stability. These may include, but are not limited to, the following:
    - a. Search for and secure housing;

- b. Increase income, connect to benefits, and secure employment
  - c. Pursue educational goals, trainings, or certifications;
  - d. Improve credit history and build savings;
  - e. Address physical or behavioral health challenges; and
  - f. Connect to legal resources or other social supports as needed.
4. Grantee shall assess the participant's employment and educational skills and goals at intake and incorporate those into the participant's Housing Stability Plan.
  5. Grantee shall assist with housing coordination services to support a successful transition into housing, including providing transportation and accompanying the participant, as needed, to submit housing applications or to visit available housing units;
  6. Grantee shall support the participant in making a successful transition to housing, including by accompanying the participant during the move-in process, orienting the participant to the neighborhood, and connecting the participant to all necessary external resources and services;
  7. Grantee shall make referrals to mainstream resources such as linkages to resources for physical and behavioral health services, childcare services, legal resources, In Home Support Services (IHSS) or any other services the participant needs to achieve housing stability.
  8. Should the participants' needs exceed the capacity of the Grantee, Grantee shall support the participant with linkages to community resources, money management, Smart Money Coaching, and crisis intervention services within a housing first, trauma-informed, and harm reduction framework;
  9. Grantee shall assess need for public benefits, if needed Grantee will sign participants up for all public benefits for which they qualify;
  10. Grantee shall collaborate with housing location providers, if applicable, and any other organizations serving the participant, with regular check-in meetings, case conference calls, and other communication, as needed.
  11. Grantee shall support the provision of targeted services and/or referrals to another appropriate agency for participants whose behavior indicates substance abuse, mental health, or another issue that is jeopardizing the participant's housing retention and/or health; and
  12. Grantee shall begin program exit planning early in the housing process. Grantee shall engage the participant in exit planning early in the housing process to support the participant's successful transition off the rental subsidy as quickly as possible. The exit plan shall depend on the participant's needs and preferences and may include establishing linkages to services in the greater community.
- B. Housing Location Services: Grantee shall provide Housing Location Services to identify and secure housing units. Housing Location Services shall include, but are not limited, to the following:
1. Grantee shall conduct landlord recruitment and establish relationships with landlords, property owners, and property management companies that agree to house qualifying participants;
  2. Grantee shall conduct comprehensive housing searches to identify units that meet participant needs. Units shall be reasonable in size, in close proximity to

transportation and other amenities, consistent with participant preferences to the greatest degree possible, and accessible to participants with disabilities. Units may include, but are not limited to, single units in multi-family buildings, blocks of units in multi-family buildings, shared housing, and other options that help participants achieve residential stability and overall health and well-being;

3. Grantee shall understand current housing laws, restrictions, applicability, and time periods for proactive communication with landlords and participants;
4. Grantee shall build clear expectations for landlords and participants, and respond quickly and appropriately to any questions or concerns;
5. Grantee shall engage with local landlord organizations and housing associations to educate them on housing subsidy opportunities to increase visibility, awareness, and engagement across the larger marketplace;
6. Grantees shall utilize innovative strategies to remove barriers to housing, and negotiate partnerships to increase landlord engagement and participation in rental assistance programs;
7. Grantee shall partner with HSH to identify and act upon opportunities to secure units. This may include presentations, planning, and other activities needed to engage new partners, or otherwise expand the housing inventory supported with RRH resources; and
8. Grantee may provide subsidies for units outside of San Francisco if every effort has been made to find housing within San Francisco, or if a tenant requests to move outside the City.

C. Housing Coordination Services: Grantee shall provide Housing Coordination Services to match participants to housing opportunities, eliminate barriers to housing placement, and allow for rapid placement into housing. Housing Coordination Services include, but are not limited to, the following:

1. Grantee shall communicate and coordinate with Coordinated Entry and RRH case management partners to remove any barriers to the housing referral process;
2. Grantee shall negotiate lease terms on behalf of participants being placed into housing, and conduct lease review to ensure compliance with local and state laws and regulations;
3. Grantee shall support referrals in securing units (e.g. completing housing applications, scheduling viewing appointments, and understanding lease and supporting documentation);
4. Grantee shall partner with case management providers to collect all necessary documents to support participants to successfully move into housing;
5. Grantee shall work to eliminate barriers to housing (e.g. assisting with clearance of outstanding utility debt, credit repair, and correcting erroneous unlawful detainers);
6. Grantee shall conduct initial and annual unit inspections to ensure compliance with Housing Quality Standards (HQS) and/or comparable habitability standards;
7. Grantee shall utilize fair market rent (FMR) to determine if a unit is reasonable and within funding parameters;

8. Grantee shall provide education on tenancy requirements, including helping participants understand lease requirements, demonstrating how to turn on utilities and access online portals, and providing any other tenancy education as needed;
  9. Grantee shall communicate the following expectations with participants:
    - a. Contribution toward the rent is due on the first month and how to make the payment; and
    - b. How much the participant is responsible for each month; and
    - c. Tenants are expected to take over the full rent as quickly as possible while ensuring tenant stability.
  10. Grantee shall work with property management to complete an assessment and conduct any requisite minor repairs to improve accessibility or other functional enhancements;
  11. Grantee shall support payment of items needed during housing search and move-in (e.g., application fees, security deposit, furniture, and moving costs) in alignment with funding compliance;
  12. Grantee shall support with resolving maintenance requests, lease violations, lockouts, and all other unit-related challenges; and
  13. Grantee shall conduct home visits in a manner and frequency consistent with the Engagement Policy.
  14. Grantee shall recertify the tenant's eligibility to receive subsidy assistance every three months, at minimum, and more frequently if the tenant's income reaches 200 percent of the rent amount. The subsidy assistance may be renewed if the tenant is moving toward successful transition from the subsidy assistance by increasing income or, when that is not a realistic goal, support transitioning to another subsidized housing situation.
- D. Subsidy Administration Services: Grantee shall provide Subsidy Administration Services to fulfill the administrative, financial, and record-keeping functions required to issue and document timely and accurate subsidy payments and other types of financial assistance. Subsidy Administration Services include, but are not limited to, the following:
1. Grantee shall complete timely and accurate payment of flexible funding to eliminate other barriers to housing;
  2. Grantee shall make initial payments associated with participant move-in, including security deposits, first month's rent, and subsequent monthly rental payments;
  3. Grantee shall set the expectation that participant rent is due on the first of the month and is paid directly to the landlord;
  4. Grantee shall complete timely and accurate payment of subsidies to landlords and property management, in accordance with negotiated leases;
  5. Grantee may provide subsidies for units outside of San Francisco if every effort has been made to find housing within San Francisco, or if a participant specifically requests to move outside of San Francisco;
  6. Grantee shall communicate with Housing Coordination staff to ensure the participants' income verification is up to date to ensure accurate subsidy calculation;

7. Grantee shall provide subsidies ranging in term from 12 months to up to 24 months.
  8. Grantee shall receive an initial one-year term of rental assistance. At the end of the initial rental assistance period, if the tenant is assessed to need further support, Grantee may extend assistance. Grantee may adjust the assistance amount up or down, depending on the needs of the tenant at the time. Grantee may extend rental assistance in three month increments until the tenant can sustain the rent on their own or they reach the maximum rental assistance period of 24 months.
- E. Landlord Liaison Services: Grantee shall provide Landlord Liaison Services to support ongoing housing stability, including serving as a liaison between landlords and participants. Landlord Liaison Services include, but are not limited to, the following:
1. Grantee shall maintain quarterly communication, at minimum, with landlords to identify and address concerns on a proactive basis;
  2. Grantee shall regularly collaborate with RRH case management partners to ensure participants can pay rent on time, cultivate healthy relationships with neighbors and landlords, and resolve any tenancy issues. Coordination shall consist of regular, informal communication as well as structured case coordination meetings that occur at least monthly;
  3. Grantee shall immediately respond to lease violations or other complaints, with the goal of finding resolutions that do not jeopardize housing stability. If lease violations cannot be resolved, Grantee shall work closely with landlords and participants to coordinate solutions prior to eviction;
  4. Grantee shall ensure landlords fulfill their legal responsibilities, including conducting repairs, issuing proper notices, supporting participants' rights to Fair Housing, and adhering to lease terms; and
  5. Grantee shall provide a point of contact for all partnering landlords to ensure rapid response to participant challenges and any issues that may arise.
- F. Workforce Development Services:
1. Grantee shall conduct an assessment with each tenant to determine the employment-related capabilities, needs, interests, and potential of tenant. The assessment should be documented within the initial Housing Stability Plan.
  2. Grantee shall integrate ongoing workforce development planning into the Housing Stability Plan based on the assessment which includes a vocational goal and the incremental steps towards achieving it, including linkage to public benefits, barrier remediation and support services as necessary, including and not limited to the County Adult Assistance Program (CAAP) and CalFresh;
  3. Grantee shall collaborate with Smart Money Coaching to ensure financial coaching services are integrated into workforce development programming to support upward economic mobility of tenants.
  4. Grantee shall provide job readiness preparation that includes work and education history, resume development, skill building to support tenant to conduct online job search and complete employment applications with support from staff and independently, interviewing skills, and practice interviews;

5. Grantee shall collaborate with the portfolio of workforce development programs in the City of San Francisco, including programs funded by the Office of Economic and Workforce Development (OEWD), Human Services Agency (HSA), Department of Children Youth and their Families (DCYF), as well as other private sector partnerships;
6. Grantee shall provide referrals to vocational training that helps tenants obtain in-demand employment skills that are marketable to employers from local/regional industries;
7. Grantee shall match tenants with employment opportunities and coach them through the job search process; and
8. Provide training and support to employers and tenants to ensure job retention after placement.

#### V. **Location and Time of Services**

Grantee shall provide services at 37 Grove Street, San Francisco, CA 94102, Monday through Friday from 9:00 am to 5:00 pm. Grantee shall provide services at participants' houses or other field locations, as needed.

#### VI. **Service Requirements**

- A. 1:50 Housing Coordinator Ratio: Grantee shall maintain a 1:50 ratio of Housing Coordinator to HSH adult units.
- B. 1:14 Case Manager Ratio: Grantee shall maintain a 1:14 ratio of Case Manager to HSH adult units.
- C. Income Verification: Grantee shall complete income verification for participants upon program enrollment and, thereafter, shall complete income recertification annually, at minimum, to ensure continued eligibility. During annual income recertification, Grantee shall revisit participant rent calculations and determine an appropriate rental contribution;
- 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. 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.

G. Grievance Procedure:

1. Grantee shall establish and maintain a written Grievance Procedure for participants, that 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.

H. Reasonable Accommodation Policy: Grantee shall, at program entry, review and provide a copy of a written Reasonable Accommodation policy and process to each participant and obtain a signed copy of the policy and process from the participant, which must be maintained in the participant's file.

I. Termination Policy: Grantee shall establish due process for program termination and upload supporting documentation into the Online Navigation and Entry (ONE) System (or record in a comparable system for DV providers) at program termination.

J. 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 level of satisfaction with services. Feedback methods shall include:

1. A complaint process, including a written complaint policy informing the served population on how to report complaints; and
2. A written annual survey to the served population to gather feedback, measure 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 if the written format presents any problem.

- K. City Communications and Policies: Grantee shall keep HSH informed of program operations and comply with HSH policies, training requirements, and participate in meetings, including, but not limited to:
1. Regular communication to HSH about the implementation of the program;
  2. Attendance at all meetings as required by HSH. This shall include quarterly HSH meetings; and
  3. Attendance at trainings (e.g., overdose prevention training), when required by HSH.
- L. Coordination with Other Service Providers: Grantee shall establish written agreements between case management, housing location, and other service providers that are part of the scattered site support team to formalize collaboration and roles and responsibilities.
- M. Critical Incident: Grantee shall report critical incidents, as defined in the Critical Incident Policy, to HSH, according to the Department policy. Critical incidents shall be reported using the Critical Incident Report form. In addition, critical incidents that involve life endangerment events or major service disruptions should be reported immediately to the HSH program manager.
- 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. 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 household data within three working days (unless specifically requested to do so sooner);
    - b. Ensuring accurate dates for household enrollment, household exit, and household move in (if appropriate); and
    - c. Running monthly data quality reports and correcting any errors.
  2. Records entered into the ONE system shall meet or exceed the ONE System CDQI Process standard.
  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 the CARBON database. Changes to data collection or reporting requirements shall be

---

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

communicated to Grantees via written notice at least one month prior to expected implementation.

4. Any information shared between Grantee, HSH, and other providers about the served population 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.
  5. Failure to comply with data security, storage and access requirements may result in loss of access to the HMIS and other data systems.
- P. Harm Reduction: Grantee shall integrate harm reduction principles into service delivery and agency structure as well as follow the [HSH Overdose Prevention Policy](#). Grantee staff who work directly with clients will participate in annual trainings on harm reduction, overdose recognition and response.
- Q. 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 client-centered, low-barrier access to housing and services.

## VII. Service Objectives

Grantee shall achieve the following service objectives during the term of this grant. All service objectives shall be calculated at a household level rather than per participant. A household may include more than one participant. All service objectives below will be monitored by sampling participant files during annual program monitoring visits:

- A. Housing Location Services
  1. Grantee shall provide 100 percent of participants with Housing Location Services.
- B. Housing Coordination Services
  1. Grantee shall offer 100 percent of participants with Housing Coordination services.
- C. Subsidy Administration Services
  1. Grantee shall issue 100 percent of subsidy payments on or before the first of the month every month for each participant, or at the orientation of lease; and
  2. Grantee shall provide 100 percent of participants with Subsidy Administration Services.
- D. Housing-Focused Case Management Services
  1. Grantee shall offer 100 percent of participants Housing-Focused Case Management Services;
  2. Grantee shall offer a Housing Stability Plan to 100 percent of participants receiving Housing-Focused Case Management Services; and

3. Grantee shall offer 100 percent of participants referrals to other Case Management should the participant decline Grantee's Housing-Focused Case Management Services.

E. Workforce Development Services

1. Grantee shall offer 100 percent of participants with Workforce Development Services; and
2. Grantee shall offer a workforce development assessment to 100 percent of participants; and
3. Grantee shall offer 100 percent of participants referrals to workforce development program partnerships specifically designed for RRH participants.

F. Landlord Liaison Services

1. Grantee shall provide 100 percent of participants with Landlord Liaison Services; and
2. Grantee shall respond to 100 percent of requests from participants/landlords submitted within two business days.

**VIII. Outcome Objectives**

Grantee shall achieve the following outcome objectives during the term of this grant. All outcome objectives shall be calculated at a household level rather than per participant. A household may include more than one participant. All outcome objectives will be monitored using ONE system data:

A. Housing Coordination and Housing Location Services:

1. At least 90 percent of participants enrolled in the program will successfully move into housing as verified by their housing move-in date; and
2. The average length of time that participants spend homeless, from program enrollment to housing move-in, shall be less than or equal to 75 days, as calculated by  $[\text{Housing Move-in Date}] - [\text{Enrollment Date}] / \text{Count of participants with a [Housing Move-In Date]}$ .

B. Housing-Focused Case Management, Housing Coordination Services, and Landlord Liaison Services:

1. At least 90 percent of participants will maintain their housing for 12 months or exit to a permanent housing destination; and
2. At least 80 percent of households will maintain their housing for 24 months or exit to a permanent housing destination; and
3. At least 75 percent of participants will be referred to community resources.

C. The following Outcome Objectives shall apply to Housing-Focused Case Management Services and Workforce Development Services.

1. At least 75 percent of tenants shall obtain employment or increase their income by the first annual tenant assessment compared to their status at program enrollment.

## IX. Reporting Requirements

- A. Grantee shall input data into systems required by HSH.
- B. On a quarterly basis, Grantee shall enter the required metrics, including any required templates to be uploaded, into the CARBON database by the 15<sup>th</sup> of the month following the end of each quarter:
  1. The total number of unduplicated households receiving a subsidy or case management services during that quarter; and
  2. The total number of new placements during the quarter not including relocations; and
  3. The total number of program exits and destinations.
- C. 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 HSH Program Manager in writing, specify the number of underutilized units of service and provide a plan of action to resolve the underutilization.
- D. For any quarter that underspends based on the estimated quarterly amount (25 percent each quarter), Grantee shall notify the HSH Program Manager and Contract Analyst in writing and provide a plan of action to resolve the underspending.
- E. On an annual basis, Grantee shall enter the required metrics, including any required templates to be uploaded, into the CARBON database by the 15<sup>th</sup> of the month following the end of each fiscal year:
  1. The number and percentage of participants that maintained their housing for 12 months or exited to a permanent housing destination and households that maintained their housing for 24 months or exit to a permanent housing destination; and
  2. The average length of time participants spent homeless. This should be calculated from program enrollment to move-in date;
  3. The number and percentage of participants engaging in Housing-Focused Case Management and Grantee-created housing stability plans; and
  4. The number and percentage of households referred to community resources.
- F. Grantee shall participate in annual Eviction Survey reporting, per the 2015 City and County of San Francisco Participant Eviction Annual Reports Ordinance (<https://sfbos.org/ftp/uploadedfiles/bdsupvrs/ordinances15/o0011-15.pdf>). Grantee shall provide the number of evicted households and eviction notices issued to households residing in City-funded housing through the annual HSH administered Eviction Survey. Grantee shall adhere to all deadlines for submission as required by HSH.
- G. Grantee shall participate, as required by HSH, 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 Grantee within 30 working days of receipt of any evaluation report and such response will become part of the official report.
- H. Grantee shall provide Ad Hoc reports as required by HSH and respond to requests by HSH in a timely manner.
- I. 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.

## **X. 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, 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.
1. Monitoring of program participation in the ONE system may include, but is not limited to, the audit of 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.

**Program Budget History**

Date of Budget Change	Change Type	Ongoing / One-Time	Change Amount	Asana Approval Link	Annual Budget	Total Agreement Budget	Contingency	Not-to-Exceed	Change Description
7/1/2024	New Agreement	Ongoing	\$7,605,228	Pending	\$2,535,076	\$7,605,228	\$1,521,046	\$9,126,274	New agreement for continuing services under Emergency Ordinance. Agreement term is 7/1/2024 - 6/30/2027 to align with CoC Rapid Rehousing agreement.

	A	B	C	D
1	<b>DEPARTMENT OF HOMELESSNESS AND SUPPORTIVE HOUSING</b>			
2	<b>APPENDIX B, BUDGET</b>			
3	<b>Document Date</b>	7/1/2024		
4	<b>Contract Term</b>	<b>Begin Date</b>	<b>End Date</b>	<b>Duration (Years)</b>
5	<b>Current Term</b>	7/1/2024	6/30/2027	3
6	<b>Amended Term</b>	7/1/2024	6/30/2027	3
7	<b>Program</b>	SF HOME Rapid Rehousing (RRH)		
8				
9	<b>Approved Subcontractors</b>			
10	None.			
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				
21				
22				
23				
24				
25				

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	<b>DEPARTMENT OF HOMELESSNESS AND SUPPORTIVE HOUSING</b>												
2	<b>APPENDIX B, BUDGET</b>												
3	<b>Document Date</b>	7/1/2024											
4	<b>Contract Term</b>	<b>Begin Date</b>	<b>End Date</b>	<b>Duration (Years)</b>									
5	<b>Current Term</b>	7/1/2024	6/30/2027	3									
6	<b>Amended Term</b>	7/1/2024	6/30/2027	3									
7	<b>Program</b>	SF HOME Rapid Rehousing (RRH)											
8					<b>Year 1</b>			<b>Year 2</b>			<b>Year 3</b>		
9					7/1/2024 - 6/30/2025			7/1/2025 - 6/30/2026			7/1/2026 - 6/30/2027		
10	<b>Service Component</b>												
11	Rapid Rehousing				44			44			44		

	A	B	C	D	G	J	M	AK	
1	<b>DEPARTMENT OF HOMELESSNESS AND SUPPORTIVE HOUSING</b>								
2	<b>APPENDIX B, BUDGET</b>								
3	<b>Document Date</b>	7/1/2024							
4	<b>Contract Term</b>	<b>Begin Date</b>	<b>End Date</b>	<b>Duration (Years)</b>					
5	<b>Current Term</b>	7/1/2024	6/30/2027	3					
6	<b>Amended Term</b>	7/1/2024	6/30/2027	3					
7	<b>Provider Name</b>	Compass Family Services							
8	<b>Program</b>	SF HOME Rapid Rehousing (RRH)							
9	<b>F\$P Contract ID#</b>	1000032115							
10	<b>Action (select)</b>	New Agreement							
11	<b>Effective Date</b>	7/1/2024							
12	<b>Budget Name</b>	<b>General Fund &amp; Prop C - Rapid Rehousing</b>							
13		<b>Current</b>	<b>New</b>	20%					
14	<b>Term Budget</b>	\$ -	\$ 7,605,228						
15	<b>Contingency</b>	\$ -	\$ 1,521,046						
16	<b>Not-To-Exceed</b>	\$ -	\$ 9,126,274						
17									
18			<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>All Years</b>			
19			7/1/2024 - 6/30/2025	7/1/2025 - 6/30/2026	7/1/2026 - 6/30/2027	7/1/2024 - 6/30/2027			
20			<b>New</b>	<b>New</b>	<b>New</b>	<b>New</b>			
21	<b>Expenditures</b>								
22	Salaries & Benefits	\$	990,025	\$	863,828	\$	889,743	\$	2,743,595
23	Operating Expense	\$	217,891	\$	224,428	\$	224,428	\$	666,748
24	Subtotal	\$	1,207,916	\$	1,088,256	\$	1,114,171	\$	3,410,343
25	Indirect Percentage	15.00%		15.00%		15.00%			
26	Indirect Cost (Line 24 X Line 25)	\$	181,187	\$	163,238	\$	167,126	\$	511,551
27	Other Expenses (Not subject to indirect %)	\$	1,145,972	\$	1,283,582	\$	1,253,779	\$	3,683,333
28	Capital Expenditure	\$	-	\$	-	\$	-	\$	-
30	<b>Total Expenditures</b>	\$	<b>2,535,076</b>	\$	<b>2,535,076</b>	\$	<b>2,535,076</b>	\$	<b>7,605,228</b>
31									
32	<b>HSH Revenues (select)*</b>								
33	General Fund - Ongoing	\$	1,824,676	\$	1,824,676	\$	1,824,676	\$	5,474,028
35	Prop C	\$	710,400	\$	710,400	\$	710,400	\$	2,131,200
51	<b>Total HSH + Other Revenues</b>	\$	<b>2,535,076</b>	\$	<b>2,535,076</b>	\$	<b>2,535,076</b>	\$	<b>7,605,228</b>
52	Rev-Exp (Budget Match Check)	\$	-	\$	-	\$	-	\$	-
54	*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 Mayoral / 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.								
55	<b>Prepared by</b>	Joua Lee-Jagoda							
56	<b>Phone</b>	415-644-0504							
57	<b>Email</b>	<a href="mailto:jlee-jagoda@compass-sf.org">jlee-jagoda@compass-sf.org</a>							

	A	B	C	D	E	H	I	J	K	L	O	P	Q	R	S	V	BV
1	DEPARTMENT OF HOMELESSNESS AND SUPPORTIVE HOUSING																
2	SALARY & BENEFIT DETAIL																
3	Document Date	7/1/2024															
4	Provider Name	Compass Family Services															
5	Program	SF HOME Rapid Rehousing (RRH)															
6	FSP Contract ID#	1000032115															
7	Budget Name	General Fund & Prop C - Rapid Rehousing															
8		Year 1					Year 2					Year 3					All Years
9	POSITION TITLE	Agency Totals		For HSH Funded Program		7/1/2024 - 6/30/2025	Agency Totals		For HSH Funded Program		7/1/2025 - 6/30/2026	Agency Totals		For HSH Funded Program		7/1/2026 - 6/30/2027	7/1/2024 - 6/30/2027
10						New					New					New	New
11		Annual Full Time Salary (for 1.00 FTE)	Position FTE	% FTE funded by this budget	Adjusted Budgeted FTE	Budgeted Salary	Annual Full Time Salary (for 1.00 FTE)	Position FTE	% FTE funded by this budget	Adjusted Budgeted FTE	Budgeted Salary	Annual Full Time Salary (for 1.00 FTE)	Position FTE	% FTE funded by this budget	Adjusted Budgeted FTE	Budgeted Salary	Budgeted Salary
12	Rapid Rehousing Director	\$111,650	1.00	25%	0.25	\$ 27,913	\$ 115,000	1.00	36%	0.36	\$ 41,400	\$ 118,449	1.00	36%	0.36	\$ 42,642	\$ 111,954
13	Program Director	\$84,681	1.00	100%	1.00	\$ 84,681	\$ 87,221	1.00	100%	1.00	\$ 87,221	\$ 89,838	1.00	100%	1.00	\$ 89,838	\$ 261,741
14	Assistant Program Director	\$69,000	1.00	100%	1.00	\$ 69,000	\$ 71,070	1.00	100%	1.00	\$ 71,070	\$ 73,202	1.00	100%	1.00	\$ 73,202	\$ 213,272
15	Case Managers	\$56,660	3.00	100%	3.00	\$ 169,980	\$ 58,360	3.00	100%	3.00	\$ 175,079	\$ 60,111	3.00	100%	3.00	\$ 180,332	\$ 525,391
16	Case Managers (CoC)	\$58,420	3.00	100%	3.00	\$ 175,260	\$ 60,173	2.00	100%	2.00	\$ 120,345	\$ 61,978	2.00	100%	2.00	\$ 123,956	\$ 419,561
17	Aftercare Case Managers	\$58,840	1.60	100%	1.60	\$ 94,144	\$ 60,605	1.60	100%	1.60	\$ 96,968	\$ 62,423	1.60	100%	1.60	\$ 99,877	\$ 290,990
18	Housing Navigator	\$70,290	2.00	100%	2.00	\$ 140,580	\$ 72,399	1.00	100%	1.00	\$ 72,399	\$ 74,571	1.00	100%	1.00	\$ 74,571	\$ 287,549
19						\$ -	\$ -				\$ -	\$ -				\$ -	\$ -
25						\$ -					\$ -					\$ -	\$ -
54		TOTAL SALARIES				\$ 761,558	TOTAL SALARIES				\$ 664,483	TOTAL SALARIES				\$ 684,417	\$ 2,110,458
55		TOTAL FTE		11.85			TOTAL FTE		9.96			TOTAL FTE		9.96			
56		FRINGE BENEFIT RATE		30.00%			FRINGE BENEFIT RATE		30.00%			FRINGE BENEFIT RATE		30.00%			
57		EMPLOYEE FRINGE BENEFITS				\$ 228,467	EMPLOYEE FRINGE BENEFITS				\$ 199,345	EMPLOYEE FRINGE BENEFITS				\$ 205,325	\$ 633,137
58		TOTAL SALARIES & BENEFITS				\$ 990,025	TOTAL SALARIES & BENEFITS				\$ 863,828	TOTAL SALARIES & BENEFITS				\$ 889,743	\$ 2,743,595
59																	
60																	
61																	

	A	D	G	J	AH
1	<b>DEPARTMENT OF HOMELESSNESS AND SUPPORTIVE HOUSING</b>				
2	<b>OPERATING DETAIL</b>				
3	<b>Document Date</b>	7/1/2024			
4	<b>Provider Name</b>	Compass Family Services			
5	<b>Program</b>	SF HOME Rapid Rehousing (RRH)			
6	<b>FSP Contract ID#</b>	1000032115			
7	<b>Budget Name</b>	General Fund & Prop C - Rapid Rehousing			
9		<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>All Years</b>
10		7/1/2024 - 6/30/2025	7/1/2025 - 6/30/2026	7/1/2026 - 6/30/2027	7/1/2024 - 6/30/2027
11		New	New	New	New
12	<b>Operating Expenses</b>	<b>Budgeted Expense</b>	<b>Budgeted Expense</b>	<b>Budgeted Expense</b>	<b>Budgeted Expense</b>
13	Rental of Property	\$61,265	\$63,102	\$63,102	\$ 187,469
14	Utilities(Elec, Water, Gas, Phone, Scavenger)	\$13,248	\$13,646	\$13,646	\$ 40,540
15	Office Supplies, Postage	\$14,316	\$14,745	\$14,745	\$ 43,807
16	Building Maintenance Supplies and Repair	\$18,308	\$18,857	\$18,857	\$ 56,023
17	Printing and Reproduction	\$1,000	\$1,030	\$1,030	\$ 3,060
18	Insurance	\$6,932	\$7,140	\$7,140	\$ 21,213
19	Staff Training	\$7,500	\$7,725	\$7,725	\$ 22,950
20	Staff Travel-(Local & Out of Town)	\$28,440	\$29,293	\$29,293	\$ 87,026
21	Rental of Equipment	\$3,555	\$3,662	\$3,662	\$ 10,878
22	IT Services	\$19,493	\$20,078	\$20,078	\$ 59,649
23	Facilities Maintenance	\$ -	\$ -	\$ -	\$ -
24	Equipment/Furniture	\$ 26,778	\$ 27,581	\$ 27,581	\$ 81,940
25	Licenses/Technology Fees	\$ 17,056	\$ 17,568	\$ 17,568	\$ 52,191
26					\$ -
42	<u>Consultants</u>				\$ -
43					\$ -
54	<u>Subcontractors (First \$25k Only)</u>				\$ -
55					\$ -
60					\$ -
68	<b>TOTAL OPERATING EXPENSES</b>	<b>\$ 217,891</b>	<b>\$ 224,428</b>	<b>\$ 224,428</b>	<b>\$ 666,748</b>
69					
70	<b>Other Expenses (not subject to indirect cost %)</b>				
71	Direct Client Assistance	\$100,000	\$103,000	\$73,197	\$ 276,197
72	Shallow Rent Subsidies	\$913,972	\$1,044,622	\$1,044,622	\$ 3,003,216
73	Deposits	\$132,000	\$135,960	\$135,960	\$ 403,920
74					\$ -
78					\$ -
84	<b>TOTAL OTHER EXPENSES</b>	<b>\$ 1,145,972</b>	<b>\$ 1,283,582</b>	<b>\$ 1,253,779</b>	<b>\$ 3,683,333</b>
96					
97	<b>HSH #3</b>				<b>7/26/2022</b>

**BUDGET NARRATIVE**

Fiscal Year

**General Fund & Prop C - Rapid R**

**FY24-25**

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

<u>Salaries &amp; Benefits</u>	<u>Adjusted Budgeted</u>		<u>Justification</u>	<u>Calculation</u>	<u>Employee Name</u>
	<u>FTE</u>	<u>Salary</u>			
Rapid Rehousing Director	0.25	\$ 27,913	Provide oversight of all scattered site housing programs, supervise the Program Director and project staff, provide programmatic support for staff on project.	\$111,650 annual X 25% FTE	TBH
Program Director	1.00	\$ 84,681	Provides oversight for the program, ensuring compliance and attainment of service objectives and outcome goals, trains and provides supervision for Assistant Program Director and Case Managers, manages database and program reporting	\$84,681 annual X 1.0 FTE	C. Castillo
Assistant Program Director	1.00	\$ 69,000	Assists PD with program oversight, including ensuring that clients meet eligibility and documentation requirements and approving client assistance requests. Trains and provides supervision for Housing Locators, manages the ongoing relationship with landlords, supports subsidy administration in collaboration with the finance department, and serves as a liaison between landlords and clients	\$69000 annual X 1.0 FTE	B. Medina
Case Managers	3.00	\$ 169,980	Responsible for providing case management services to clients in the SF HOME RRH project. Responsible for supporting clients starting with intake, through housing search, and then for the entire time they are enrolled in the rental subsidy. Responsibilities include counseling, advocacy, administration of the housing subsidy and home visits.	\$56,660 annual X 3.0 FTE	M. Aceves-Yepez, S. Estrada, I. Rojas Mendoza,
Case Managers (CoC)	3.00	\$ 175,260	Responsible for providing case management services to clients in the SF HOME CoC project. Responsible for supporting clients starting with intake, through housing search, and then for the entire time they are enrolled in the rental subsidy. Responsibilities include counseling, advocacy, administration of the housing subsidy and home visits	\$58,420 annual X 3.0 FTE	R. Adalpe, M. Araque, A. Hall
Aftercare Case Managers	1.60	\$ 94,144	1.6 FTE Case Managers to provide aftercare services	\$58,840 annual X 1.6 FTE	G. Gonzalez; B. Mandelbaum
Housing Navigator	2.00	\$ 140,580	Provide real estate experience and housing expertise to establish a portfolio of housing units appropriate for program participants, provide outreach and education to landlords, and support clients with lease negotiations, ensure unit habitability, and conduct rent reasonableness studies.	\$70,290 annual X 2.0 FTE	T. Jackson, TBH
<b>TOTAL</b>	<b>11.85</b>	<b>\$ 761,558</b>			
<u>Employee Fringe Benefits</u>		\$ 228,467	<u>Includes FICA, SSUI, Workers Compensation and Medical calculated at 30% of total salaries.</u>		
<b>Salaries &amp; Benefits Total</b>		<b>\$ 990,025</b>			

<u>Operating Expenses</u>	<u>Budgeted Expense</u>	<u>Justification</u>	<u>Calculation</u>
Rental of Property	\$ 61,265	Rental of Property: Office rent space; allocation based on FTE and square footage.	\$5170/ FTE X 11.85 FTE
Utilities(Elec, Water, Gas, Phone, Scavenger)	\$ 13,248	Utilities (Elec, Water, Gas, Phone, Garbage): Information technology, Gas & electric, water, garbage, security, alarm & safety. Allocation based on FTE.	\$1118/FTE X 11.85 FTE
Office Supplies, Postage	\$ 14,316	Office Supplies, Postage, Microsoft & Salesforce licenses	\$1193/mo X 12 mos
Building Maintenance Supplies and Repair	\$ 18,308	Building Maintenance Supplies and Repair: Janitorial service, elevator maintenance, maintenance supplies, maintenance repairs, safety and security (fire and security alarms)	\$1545/FTE X 11.85 FTE
Printing and Reproduction	\$ 1,000	Printing and Reproduction - business card printing & production	\$83.33/mo X 12 mos = \$1,000

Insurance	\$ 6,932	Insurance - Business and professional liability, auto, and property replacement insurance. Allocation based on FTEs.	\$585/FTE X 11.85 FTE
Staff Training	\$ 7,500	staff training, hiring	\$53/FTE X 11.85 FTE X 12 mos
Staff Travel-(Local & Out of Town)	\$ 28,440	Staff travel for home and site visits and meetings with landlords	\$2370/mo X 12 mos
Rental of Equipment	\$ 3,555	Copier/printer machine leasing. Allocation based on FTEs	\$25/FTE X 11.85 FTE X 12 mos
IT Services	\$ 19,493	IT Outsourcing Services - Computer & database support. Allocation based on FTEs	\$1645/FTE X 11.85 FTE
Facilities Maintenance	\$ -		
Equipment/Furniture	\$ 26,778	program furniture, computer/IT equipment	\$2231/mo X 12 mos
Licenses/Technology Fees	\$ 17,056	computer, technology licenses,	\$1421/mo X 12 mos
	\$ -		
<b>TOTAL OPERATING EXPENSES</b>	<b>\$ 217,891</b>		
<b>Indirect Cost</b>	15.0%	\$ 181,187	

<u>Other Expenses (not subject to indirect cost %)</u>	<u>Amount</u>	<u>Justification</u>	<u>Calculation</u>
Direct Client Assistance	\$ 100,000	Direct assistance to clients to help with transit, food, hygiene supplies, household items. Approx \$8333/mo	\$8333/mo X 12 mos
Shallow Rent Subsidies	\$ 913,972	shallow rent subsidies for a min. of 44 families at average subsidy of \$1731/family	\$1731/mo X 44 families X 12 mos
Deposits	\$ 132,000	Security deposit, average of \$3000/family	\$3000/family X 44 families
	\$ -		
<b>TOTAL OTHER EXPENSES</b>	<b>\$ 1,145,972</b>		