



Sample Services Plan for a Supportive Housing Development

This is a sample plan for the provision of supportive services within a supportive housing development. Supportive housing operators may wish to use this plan as a template for the creation of their own services plans.

TABLE OF CONTENTS

1. [INTRODUCTION/OVERVIEW](#)
2. [TARGET POPULATIONS](#)
3. [SERVICE NEEDS OF THE TARGET POPULATIONS](#)
4. [SERVICE PROGRAM](#)
 - A. OVERVIEW
 - B. DESCRIPTION OF SERVICES TO BE PROVIDED
 - C. STAFFING
 - D. OUTCOMES
5. [BUDGET AND STAFFING PLAN](#)
6. [MARKETING AND FAIR HOUSING](#)
7. [ADDENDA](#)

Note: This document is included within the *Supportive Services* section of CSH's *Toolkit for Developing and Operating Supportive Housing*, which is available at www.csh.org/toolkit2. This document has been adapted from [source], which is available at www.csh.org/publications.

1. INTRODUCTION/OVERVIEW

ABC Housing Corporation, the Sponsor, is developing Nice Apartments in the South of Market neighborhood (SOMA) of San Francisco. SOMA has traditionally been the home to low and extremely low income persons, many of whom are homeless or at-risk of homelessness. The widespread development of high-end, market rate housing in the area over the past decade has driven up housing costs and resulted in widespread displacement of this population and the services that support them. In order to maintain the diversity of the SOMA community and offer housing options for the homeless residents of the area, it is important to create supportive housing in this neighborhood. To this end, Nice Apartments will include 98 units of service-enriched housing targeted to homeless and at-risk households, many of whom will also have other special needs. The project will have 3,200 square feet of internal common space that will be used for on-site social service programs for residents, including service coordination, case management, and educational services.

The Sponsor, through its Resident Services Coordinator Program (RSCP), will provide overall service coordination for Nice Apartments. ABC has partnered with DEF Services and GHI Services to provide the intensive case management that many of the project's residents will require. It is ABC's goal to create a service delivery system that can adapt to the changing needs and circumstances of the residents during initial occupancy and throughout the life of the project.

2. TARGET POPULATIONS

ABC has developed the Nice Apartments for the purpose of primarily serving single individuals and families who are homeless or who are at-risk of homelessness by virtue of their low incomes. Many of these homeless and at-risk households will also have special needs, including, but not limited to mental illness, co-occurring mental illness and substance use issues, physical disabilities, developmental disabilities, HIV/AIDS, and domestic violence issues. Some of the tenants may also be youth exiting the foster care system.

The sponsor has devised a rent structure that is appropriate for the target populations. The Nice Apartments will consist of 98 units of housing: 33 studios, 55 one-bedrooms, 8 two-bedrooms, and 2 managers units. ABC has obtained financing through the Low Income Housing Tax Credit Program (LIHTC), the San Francisco Mayor's Office of Housing (MOH), and the State of California's Multifamily Housing Program (MHP) for all 98 units. With these funding sources, ABC has been able to establish very affordable rents: 48 of the units will have rents affordable to households at approximately 27% of area median income (AMI) ¹ and 50 will have rents affordable to those at 60% of AMI. In addition, 24 of the 60% units will also have project-based Section 8 subsidies from the San Francisco Housing Authority, making them affordable to persons with incomes as low as 0% of AMI. ABC has also applied for HUD Shelter Plus Care (S+C) funding for another 20 units, and expects to receive a funding commitment in December 2004.

¹ Per the MHP funding, these units are affordable to households at 40% State Median Income (SMI), which when converted to AMI is approximately 27%.

The MHP funding requires that at least 74 of the units be occupied by households with Special Needs.² Additionally, financing from the Mayor's Office of Housing requires that the units serve persons who are homeless or at-risk of homelessness and/or disabled.

Based on the rent structure and financing requirements, ABC has developed the following more detailed description of the target populations and projected numbers of persons to be housed at the Nice Apartments.³

- Homeless Persons with Disabilities and Homeless Families. The 20 S+C units will be targeted to homeless individuals with disabilities (including mental illness, substance use issues, physical disabilities, HIV/AIDS and other chronic health conditions) and to homeless families (including families in which one or more member has a disability). It is estimated that about half of these households will meet HUD's definition of chronic homelessness (a single disabled individual who has been continuously homeless for one year, or who has experienced 4 episodes of homelessness in the past 3 years). These households are expected to be earning between 0% and 20% of AMI.
- Developmentally Disabled Individuals. Approximately 10 units will be targeted to individuals with Developmental Disabilities, the majority of whom will also be at-risk of homelessness due to their extremely low incomes.
- Extremely Low Income Individuals and Families At-Risk of Homelessness. Approximately 40 units will be targeted to single individuals and families who are at-risk of homelessness due to their very low incomes (these households will be between 10% and 27% of AMI). Many will also have other special needs (such as disabilities or domestic violence issues) and may include youth aging out of the foster care system.
- Low Income Individuals and Small Families. Approximately 26 of the units will be targeted to the "working poor," meaning single individuals, couples or small families earning no more than 60% of AMI.

² Special Needs is defined as: means disabled households, agricultural workers, single-parent households, victims or survivors of domestic or physical abuse, households enrolled in Welfare-to-Work programs, homeless persons, or persons at risk of becoming homeless, chronically ill persons including those with HIV and mental illness, displaced dependent parents (or expectant dependent parents), emancipated foster youth, individuals exiting from institutional settings, chronic substance abusers, or other specific groups with unique housing needs as determined by the Department. 'Special Needs Populations' do not include seniors or the frail elderly unless they otherwise qualify as Special Needs Population." (California Code of Regulations, Title 25, Division 1, Chapter 7, Subchapter 4, Article 2, Sec. 7301, gg).

³ These figures are estimates only. While ABC is targeting particular populations, Fair Housing law requires that income-qualified households not be unfairly excluded simply because they do not fit a special needs category. Additionally, the tenants of the Section 8 units must be drawn from the San Francisco Housing Authority's Section 8 Waiting List, and it is not possible to determine in advance exactly what the income levels and special needs of those households will be. A demographic profile of the Section 8 waiting list is provided in Appendix 1.

It is estimated that there will be approximately 20 children in the project, mostly in the two-bedroom units. A few of the one-bedroom units many house a single parent and child.

3. SERVICE NEEDS OF THE TARGET POPULATION

Nearly two decades of experience by the supportive housing industry has demonstrated that special needs populations, and particularly homeless and at-risk individuals and families, require a rich array of support services to help them maintain stable housing, to achieve their life goals, and to grow and thrive towards greater self-determination and self-sufficiency. ABC has researched projects with populations that are similar to the Nice Apartments and consulted with experts in the field of supportive housing to arrive at the following description of the expected service needs of the target populations:

| Population | Service Needs |
|---|---|
| All tenants | Intake and assessment, information and referral, recreational and socialization activities, community building activities, support groups, on-site educational opportunities (i.e. computer classes). |
| Homeless individuals and families (including chronically homeless) | Intensive case management, with emphasis on behavioral health and primary health issues, independent living skills, and employment/educational goals. Intensive case management includes individualized service planning and goal setting, coordination of services, counseling and support, crisis intervention, intensive assistance with accessing mainstream services and other community-based resources. The service needs of homeless families will also include parenting support, childcare and after school programs. |
| Developmentally disabled tenants | Intensive case management, with emphasis on independent living skills and vocational/educational goals. Intensive case management includes individualized service planning and goal setting, counseling and support, coordination of services, and assistance with accessing mainstream services and other community-based resources. |
| Extremely low income individuals and families at-risk of homelessness | Case management, with emphasis on independent living skills and employment/educational goals, behavioral health and primary health issues as needed, domestic violence counseling and parenting support as appropriate. Case management includes individualized service planning and goal setting, counseling and support, coordination of services, and assistance with accessing mainstream services and other community-based resources. Families in this group will also have service needs in the area of childcare and after school programs. |
| Low income individuals and small families | Service coordination, with emphasis on employment and training services and resources for families and children. Service coordination includes information and referral, with some follow through to help tenants access needed services. |

4. SERVICE PROGRAM

A. Overview

The Nice Apartments will provide a unique opportunity for households who are homeless, at-risk of homelessness, or who have very low incomes. Residents of the Nice Apartments will live in a community with full access to services and programs that will meet their specific needs, while encouraging independence and growth. The project will offer different levels of support, depending on the service needs of the individual or family. Populations will thrive and flourish in an environment that offers a variety of levels of support. Services will be offered through a coordinated effort among the owner, property management staff, on-site service staff, and the tenants themselves – ensuring a healthy living environment for all residents.

The overall philosophy of service delivery at the Nice Apartments will focus on helping residents to maximize their ability to live independently. The service philosophy of both DEF Services and GHI Services is based on providing compassionate, individualized, voluntary services designed to help tenants meet their own goals for self-sufficiency and self-determination.

The Resident Services Coordinator (RSC) will be responsible for overall coordination of program services onsite. ABC is partnering with two service providers who will provide case management and other services to the majority of the project's residents. These service provider partners are:

- *DEF Services:* DEF will be the lead supportive service partner for Nice Apartments, providing case management to the homeless and at-risk individuals and families.
- *GHI Services:* GHI will serve residents with developmental disabilities by providing access to a full range of services that advance self-determination, dignity and quality of life. Their services specifically focus on: housing retention, advocacy, employment, life skills, and leisure.

The specific services to be provided by each organization are described in the next section. Background information about DEF and the GHI are provided in the Addenda.

B. Service Providers and Their Roles

The on-site service program at the Nice Apartments will be a joint effort of ABC/ABC Property Management Corporation, DEF and GHI.

1. The Resident Services Coordinator Program (ABC)

The Resident Services Coordinator Program was created by ABC to develop and coordinate resident services at ABC properties. ABC's Manager of Resident Services oversees the Resident Services Coordinator Program and works with ABC staff during the predevelopment and development phase to conceptualize the potential services and programs that could be needed at each site, develop service plans, develop relationships with partner service agencies to provide on and off-site services, and assist with the identification of service funding. All services and programs at ABC properties are coordinated and monitored through the Resident Services Coordinator Program.

At the Nice Apartments, The RSC has overall responsibility for the design and implementation of the service program. The RSC will identify and implement needed direct services by identifying appropriate partners and creating an on-site social service team that will provide needed services to residents. The RSC is responsible for creating a supportive atmosphere in which support service staff work side-by-side with property management staff to develop a comprehensive approach to meeting resident needs that focuses on helping residents to sustain their housing. The RSC will ensure that all service are culturally appropriate and special needs sensitive, and will work with the partnering agencies to develop and implement a plan for tenant engagement.

In addition to overall program coordination, the RSC will provide some direct services to residents, including:

- Conducting an initial resident orientation and ensure each new resident receives an assessment from DEF, to determine their interest in and need for on-site services.
- Providing general information and referral to services for all the project's tenants (but not case management, which will be the responsibility of the partner agencies).
- Coordinating on-site recreational, social and community-building activities; support groups; and educational opportunities such as computer classes, speakers, etc.
- Coordinating services and activities for the project's children, through a collaborative relationship with the Homeless Children's Program.
- Conducting assertive tenant engagement to encourage participation in services

2. DEF Services

The majority of direct individual supportive services at the Nice Apartments will be provided by DEF. DEF will provide case management and other services to 20 homeless individuals and families in the S+C units, plus 40 extremely low income individuals and families who are at-risk of homelessness. DEF will also provide services as needed to the 26 households occupying the 60% AMI units.

These DEF services are contingent upon ABC receiving the S+C award for which it has applied. The application is highly likely to receive HUD approval.

Background

(In this section of the Service Plan, background information is provided about DEF Services including the date of incorporation, the mission, number of people served, its experience and qualifications serving the population and in supportive housing.)

DEF Responsibilities

DEF's general responsibilities at the Nice Apartments will include hiring on-site staff that will have significant experience in working with homeless and at-risk populations; developing program strategies in collaboration with the RSC, onsite property management staff, and residents; engaging with tenants, developing strong relationships, and becoming familiar members of the community.

DEF's client-specific work will consist primarily of assessment and case management. DEF staff carry out an initial needs assessment of each resident. Those who are assessed to have significant

support service needs and/or who wish to work on a self-directed goal plan, will be offered case management services. It is anticipated that the majority of the project's homeless and at-risk residents will be in need of case management. DEF case management services will be provided on-site.

Services To Be Provided

DEF will offer the following services:

Case Management: DEF will conduct outreach and engagement with all the project's formerly homeless and at-risk tenants, both single individuals and families with children. DEF's case management staff will creatively encourage all residents to explore their fullest potential, and will work with interested residents to develop a self-directed goal plan designed to help the resident address any present issues (such as substance use, mental health concerns, parenting issues, vocational or educational goals) and to maximize their independence and self-sufficiency. DEF has developed programming that supports residents in challenging unhealthy behaviors and assists residents in securing linkages with organizations that can provide needed services. DEF staff will assist residents in applying for entitlement programs such as CalWORKs, general assistance, supplemental security income, and employment opportunities. The case manager will also assist residents with developing needed life skills, such as housekeeping, shopping, etc. DEF staff is dedicated to helping residents achieve self-sufficiency, as well as a strong sense of community within their buildings.

Vocational Services: DEF will offer vocational services through its Employment Program. *(In this section, details are provided about the location and scope of services provided by DEF's Employment Program and about how tenants will access the program.)*

Mental Health Services: The Nice Apartment residents will have access to DEF's Mental Health Internship Program. *(In this section, details are provided about the location and scope of services provided by the Mental Health Internship Program and about how tenants will access the program.)*

Support Groups: DEF staff will also coordinate on-site support and therapeutic groups, which include Narcotics Anonymous, Alcoholics Anonymous, and groups dedicated to emotional, physical, and spiritual wellbeing. Each of these groups will contribute to creating an atmosphere that will allow residents to confront their mental health and substance use issues with confidence and support.

DEF will also link tenants to the following services: *(In this section, details are provided about relationships with outside agencies including organization names, locations, populations served, capacity, any MOUs that are in place, any plan for on-site service delivery, etc.)*

Behavioral Health and Health Services:

HIV/AIDS Services:

3. GHI Services

GHI provides support services and independent living skills training for people with developmental disabilities. *(In this section of the Service Plan, background information is provided about GHI Services including the date of incorporation, the mission, number of people served, its experience and qualifications serving the population and in supportive housing.)*

Approximately ten of the units at Nice Apartments will be targeted to households that include developmentally disabled residents. One unit has been set-aside for a Live-In Rehabilitation Manager who will serve residents at Nice Apartments who are developmentally disabled, enabling GHI to implement a defined services program to help clients live independently with a built-in support network. In addition, GHI will use facilities at Nice Apartments to provide supportive services for the developmentally disabled residents. GHI will employ support services instructors to provide off and on-site support services and independent living skills training to the residents of the designated units.

Funding for GHI's services is mandated by state law (the Lanterman Act). People with developmental disabilities are entitled to the supports they need to live independently in the community and GHI is authorized as a vendor to provide these services and paid to do so by Golden Gate Regional Center. Golden Gate Regional Center is also mandated by state law (the Lanterman Act) to provide case management and coordination of services for people with developmental disabilities. GHI will be responsible for ensuring that the necessary funding is obtained to provide services to developmentally disabled adults who reside at Nice Apartments.

GHI's responsibilities at Nice Apartments are to:

- Assign GHI case manager in conjunction with Golden Gate Regional Center to develop a plan of services for each developmentally disabled resident of Nice Apartments, enabling them to live safely in the apartments. (Because these are studios or 1-bedroom apartments, we do not anticipate the need or ability for clients to have a live-in attendant in their apartment.).
 - Provide each developmentally disabled adult who lives at Nice Apartments from 5-30 hours a month of direct training, with an average of about 15 hours a month. The majority of the clients GHI serve work at least part-time. If they are not working, they are provided with a day program at sites other than their residence.
 - Provide case management, emergency assistance, and on-site counseling for residents through a Live-in Rehabilitation Manager.
 - Provide part-time staff, such as Social Recreation Volunteers and Self-Advocacy Instructors, to provide on-site training to GHI-related residents at Nice Apartments or accompany them into the community for shopping, medical appointments, banking, etc.

GHI will provide the following specific case management-related services for developmentally disabled residents at Nice Apartments:

- At move in, provide mobility training and orientation to facilities in the area. *(on-site)*
- Provide in-home services by GHI Residential Instructors including teaching, cooking, cleaning, budgeting and grooming as needed. The instructors will also be available in the evenings and on weekends to assist residents in the event of a crisis. They will be responsible for providing safety instruction and simple maintenance instruction. *(on-site)*

- Coordinate the selection of “In-home” Personal Assistants from the San Francisco Department of Human Services to advise on personal hygiene/grooming, food preparation and cleaning techniques. *(on-site)*
- Assist residents in supervising the In Home Personal Assistant,
- Assign an off-site Rehabilitation Manager to each resident, who will perform case coordination activities and supervise the Live-in Rehabilitation Manager. *(both on-site and off-site)*
- Assist residents in accessing the resources of the Golden Gate Regional Center, which provides case management, crisis management, and funding for the individual resident service programs. *(off-site)*
- Provide opportunities for residents to attend ongoing workshops and classes offered by or through GHI. *(off-site)*
- Oversee the selection of qualified medical and dental personnel and oversee appointments and medications in conjunction with the Golden Gate Regional Center. *(off-site)*
- Provide each resident with access to an on-call system during times when the Live-In Rehabilitation Manager is not available. Each resident will have access, via beeper or telephone, to a GHI employee 24 hours a day, seven days a week. This safety system will be backed up by the Golden Gate Regional Center, which also operates a 24 on-call system. *(off-site)*

4. Services for Families with Children

The Nice Apartments will provide housing to a small number of families, including an estimated 20 children. The RSC and the DEF staff will take the lead in providing services to families. As noted above, the case management services that will be provided by DEF will encompass all family members, including both adults and children. DEF will assist families with children to access needed services such as child care, after school programs, children’s health insurance programs, etc.

Additionally, the RSC will be responsible for coordinating a wide range of services and activities provided on-site through a partnership with the Homeless Children’s Program (HCP). The HCP and its partnering agencies work with formerly homeless children and youth (between the ages of six and seventeen) and their families, to help them establish and maintain developmentally and culturally appropriate mental health statuses. HCP has committed to provide numerous services at the Nice Apartments, including individual therapy, therapeutic play groups, parenting groups, workshops, and training for parents and providers. Families at the Nice Apartments will also have access to the on-site computer center, which will provide resources for both adults and children.

The RSC and DEF will also assist families to access the following resources:

Downtown Childcare Center and Family Services (CCFS):

CCFS works with families to provide parent education, referrals, family field trips, one-on-one support to families in transition, and childcare.

CalWorks:

CalWorks is a welfare program that is operated by the local county welfare department and provides short-term financial assistance to families in need of help. In San Francisco, DHS is the local entity

overseeing the program. Families that qualify can get access to medical coverage, child support, family planning services, child health and disability prevention, and a wide range of social services. The on-site staff will work with eligible residents and CalWorks to get access to necessary services and financial assistance.

5. Other Services

ABC's Manager of Resident Services, DEF and GHI will work with a variety of community service and program partners to provide additional services to the tenants at the Nice Apartments. These include the following services (some of which are contingent upon ABC receiving S+C funding):

Department of Public Health (DPH)

As noted above, DPH will provide behavioral health and health services to qualified residents of the Nice Apartments.

Department of Human Services (DHS):

DHS manages the S+C waiting list, and will be responsible for referring potential tenants for the S+C units. Many of the project's residents will be eligible to access DHS services, including employment and training services, children and family services, and health and nutrition programs.

(Other organizations are listed here and the specific commitments they will make related to services, food, equipment, etc.)

The RSC Program Staff and DEF will be responsible for coordinating all of the community partners to create a comprehensive service program.

(Listed here are additional technical assistance resources that are available or already accessed by ABC.)

C. Staffing

This section describes the off-site and on-site staffing for the Nice Apartments.

ABC Manager of Resident Services

Responsible for oversight of all of The RSC programs, providing guidance for service delivery, and supervising on-site service and resident service coordinators at ABC properties. At the Nice Apartments, the Manager of Resident Services will work with the on-site RSC and partnering agencies to design and implement the service programs, troubleshoot problems, provide advocacy to and act as a liaison for residents with service agencies and building management; develop relationships with community organizations to form a cooperative network of social service

agencies. This is a full-time position, located off-site at ABC's main office. The Manager of Resident Services will devote approximately 10% of her time to the Nice Apartments.

Resident Service Coordinator

Responsible for overall coordination of services at the Nice Apartments, including activities of the service partners. Conducts initial tenant orientations; works with site staff, residents, and service providers to identify resident service needs; provides information and referral to residents; coordinates schedules, community/service space, volunteers, and personnel for third party service providers; organizes recreational and community building activities, educational activities (i.e. computer classes), and support groups; maintains statistics on attendance and participation in activities. Serves as liaison to ABC's Manager of Resident Services. This is a part-time, on-site position.

DEF Support Services Manager

Responsible for overall development of the service program, in conjunction with ABC's Manager of Resident Services and Resident Services Coordinator. Supervises two on-site DEF Case Managers; communicates and coordinates with other partner organizations; maintains relationships with the immediate and broader community and stays abreast of current programs and resources; carries out goals and direction as approved by ABC. Also responsible for developing systems for collecting and tracking client data as needed to satisfy funder requirements (particularly HUD Annual Performance Report for the S+C units) and to generate outcome data for the purpose of program evaluation. Duties will also include some needs assessment; case management, developing and implementing client goal plans, coordinating services, problem solving and making service referrals. This is a full-time, on-site position.

DEF Case Managers (2)

Responsible for providing case management services to homeless and at-risk families and individuals. Duties include outreach and engagement; needs assessment; case management; developing and implementing client goal plans; coordinating services; problem solving and making service referrals. These are full-time, on-site positions.

GHI Live-in Rehabilitation Manager

Coordinates all of the services developmentally disabled tenants require. Provides case management and service coordination. Assists residents in choosing individual instructors, supervises the instructors and reviews reports from the instructors. Coordinates with the Golden Gate Regional Center to determine the hours of support services for each resident and provide primary case management. Lives on-site. This is a full-time position.

GHI Residential Instructor

Creates a learning environment in which adults with developmental special needs can learn to function more independently in their home and in the community; Designs instruction methods based on measurable objectives, maintain records of client progress, analyzes barriers to learning, and creates alternative instructional plans to overcome barriers to learning; Travels to, and works with, clients in their homes. This is a full-time position.

D. Outcomes

The general goal and objective of the social service program at the Nice Apartments is to assist residents to: (1) maintain stable housing; and (2) achieve their own self-determined life goals.

The programs and services will be evaluated using a variety of methods.

Quantitative Outcome Objectives:

The following outcome objectives will be established and progress tracked on a monthly basis:

- Support service staff will conduct outreach to and engagement with 100% of the residents living in the Nice Apartments.
- 100% of tenants who have not paid rent on time, or who have been formally notified regarding any other lease violation, will be offered supportive services; 60% of those who engage in services will establish a written plan that remedies late payment of rent and/ or lease violation; 80% of those who develop a plan will remain in housing for at least 90 days without being evicted.
- 85% of tenants will remain in housing for 1 year.
- 80% of participants who enter without any income will establish income from employment and or public assistance for which they are eligible within six months of enrollment

The following outcome objectives will be established and progress tracked on a monthly basis for all homeless tenants:

- 50% of formerly homeless tenants will participate in an organized educational, skill-building activity each month and 75% will participate in this kind of activity over the year.
- 15% of formerly homeless tenants will be successful in obtaining or maintaining employment during each year.
- Within 90 days of engaging in services, 70% of homeless tenants will develop an individualized service plan, which establishes goals and objectives and identifies activities leading to their accomplishment.
- 85% of crises that could have resulted in hospitalization and/or eviction will be resolved without the utilization of involuntary services or loss of housing for tenants.
- 65% of all formerly homeless residents will participate in group and/or community activities.
- Our goal is for all tenants to remain permanently housed. However, some tenants will chose to leave the project for their own reasons. 50% of formerly homeless tenants who leave this

housing will move to a stable housing situation (such as unsubsidized housing, other supportive housing, or living with family/friends), or be placed in inpatient treatment facilities where their special needs can be better addressed.

Qualitative Evaluation

The onsite coordinator and ABC's Manager of Resident Services will develop a Resident Service Coordinator Program plan for each service area and will evaluate its effectiveness annually:

- Services to Families and their Children
- Services to Homeless Persons and Persons At-Risk of Homelessness
- Services to Children and Youth
- Services to Adults with Developmental Disabilities
- Services to Adults Over 60

DEF and GHI will be responsible for maintaining current written reports, charting and other paperwork required in documenting services and recording each unit of services provided to tenant in charts. They will collect data weekly and compile reports annually. The RCS and DEF will be responsible for aggregating the data and producing reports as needed to satisfy funding requirements.

Evaluation of Services to Developmentally Disabled Clients

All on-site and off-site programs for developmentally disabled clients will be evaluated by GHI's main service center and the Golden Gate Regional Center.

Methodology:

- The Live-in Rehabilitation Manager will visit each client's home once a month with the client's permission so the client may discuss his or her satisfaction with the program services and the In-home Personal Assistant's conduct and performance. Each client's opinion will be sought and considered.
- GHI will require In-home Personal assistants to use daily tracking sheets for documentation purposes. From the tracking sheets, the Residential Instructor will complete and submit monthly progress reports of each client to GHI's Director of Community Living Services.
- GHI will require In-home Personal Assistants to work the hours specified in the Individual Program Plan developed by the planning team. The hours worked will often be evenings and/or weekends. GHI's Director of Community Living Services will supervise the In-home Personal Assistants.
- The Live-In Rehabilitation Manager will review reports on all clients monthly to ensure that the services provided are maintained.
- GHI will ask clients to complete a periodic Service Satisfaction Survey.

5. PRELIMINARY BUDGET AND STAFFING PLAN

| | | TOTAL | DEF | GHI | ABC | Notes |
|--|------------|-------|-----|-----|-----|----------------------|
| USES | FTE | | | | | |
| ABC's Manager of Res. Services | 5% | | | | | off-site, in-kind |
| Resident Services Coordinator | 25% | | | | | onsite function |
| DEF Support Services Manager | 100% | | | | | onsite function |
| DEF Case Manager | 100% | | | | | onsite function |
| DEF Case Manager | 100% | | | | | onsite function |
| DEF Housing Management | 30% | | | | | off-site function |
| GHI Live-In Rehab Manager | 100% | | | | | live onsite function |
| GHI Residential Instructor | 100% | | | | | onsite function |
| Total Salary | | | | | | |
| Tax & Benefits | | | | | | |
| Total Salary & Benefits | | | | | | |
| Office Supplies | | | | | | in-kind |
| Postage | | | | | | in-kind |
| Staff Transportation & Parking | | | | | | |
| Training & Development | | | | | | in-kind |
| Insurance | | | | | | in-kind |
| Miscellaneous (Supplies, etc..) | | | | | | in-kind |
| Food and Food Service Supplies | | | | | | in-kind |
| Copier / Reproduction | | | | | | in-kind |
| Total Operating Expenses | | | | | | |
| Rent--Office /Service Space ¹ | | | | | | in-kind |
| Rent—GHI Manager Unit ² | | | | | | in-kind |
| Total Program Space Rent | | | | | | |
| TOTAL PROGRAM | | | | | | |

| | | | | | | |
|--|--|--|--|--|--|--|
| EXPENSES | | | | | | |
| Indirect Expenses @10% | | | | | | |
| TOTAL BUDGET | | | | | | |
| <i>TOTAL WITHOUT In-Kind</i> | | | | | | |
| | | | | | | |
| SOURCES | | | | | | |
| Project Cash Flow ³ | | | | | | |
| Golden Gate Regional Center | | | | | | |
| TOTAL REMAINING GAP | | | | | | |
| | | | | | | |
| 1 Based on approx 3000 sf space @ \$1/sf/month | | | | | | |
| 2 Based on a 60% AMI unit rent. Development is currently paying for full GHI manager unit. | | | | | | |
| 3 Securing this level of cash flow is contingent upon receipt of S+C funding | | | | | | |

6. MARKETING AND FAIR HOUSING

ABC realizes the complexity of attracting special needs residents to Nice Apartments while complying with all applicable, federal, state, and local statutes and regulations regarding fair housing and non-discrimination. To carry this out, ABC Property Management Corporation has created a multi-phase marketing plan. A copy of the Marketing Plan is attached.

7. ADDENDA

1. Section 8 Waiting List Demographics

For planning purposes, it is necessary to make assumptions about the likely characteristics of the future residents in the development. Because all of the units will be affordable to very low- and low-income populations and 24 of the units subsidized with Project-Based Section 8 Assistance, ABC researched and conducted some demographic analysis of the current Section 8 wait list with the assistance of the San Francisco Housing Authority.

(Details from the demographic analysis are contained in this section.)