

AMENDMENT ONE TO AGREEMENT

BETWEEN THE COUNTY OF SAN MATEO AND THE INSTITUTE ON

AGING

THIS AMENDMENT TO THE AGREEMENT, entered into this _____. 20____, by and between the COUNTY OF SAN MATEO, hereinafter called "County," and The Institute on Aging, hereinafter called "Contractor";

WITNESSETH:

WHEREAS, pursuant to Government Code, Section 31000, County may contract with independent contractors for the furnishing of such services to or for County or any Department thereof;

WHEREAS, the parties entered into an Agreement for providing Home Safe services on June 25, 2024; and

WHEREAS, the parties wish to amend the Agreement to increase contract amount, extend contract period and update exhibits.

NOW, THEREFORE, IT IS HEREBY AGREED BY THE PARTIES HERETO AS FOLLOWS:

1. Section 2, Paragraph 1 of the agreement is amended to read as follows:

In consideration of the payments set forth in this Agreement and in Exhibit B (rev.

5/23/2025), Contractor shall perform services for County in accordance with the terms, conditions, and specifications set forth in this Agreement and in Exhibit A (5/23/2025).

2. Section 3, Paragraph 1 of the agreement is amended to read as follows:

In consideration of the services provided by Contractor in accordance with all terms, conditions, and specifications set forth in this Agreement and in Exhibit A (Rev. 5/23/2025), County shall make payment to Contractor based on the rates and in the manner specified in Exhibit B(Rev. 5/23/2025). County reserves the right to withhold payment if County determines that the quantity or quality of the work performed is

unacceptable. In no event shall County's total fiscal obligation under this Agreement exceed EIGHT HUNDRED SEVENTY -FIVE THOUSAND DOLLARS (\$875,000). In the event that the County makes any advance payments, Contractor agrees to refund any amounts in excess of the amount owed by the County at the time of contract termination or expiration.

Contractor is not entitled to payment for work not performed as required by this agreement.

3. Section 4, Paragraph 1 of the agreement is amended to read as follows:

Subject to compliance with all terms and conditions, the term of this Agreement shall be from July 1, 2024 through September 30, 2025.

4. Original Exhibit A is replaced with Revised Exhibit A, (rev. 5/23/2025).

5. Original Exhibit B is replaced with Revised Exhibit B, (rev. 5/23/2025).

6. Original Exhibit C is replaced with Revised Exhibit C, (rev. 5/23/2025).

7. All other terms and conditions of the agreement dated 6/25/2024, between the County and Contractor shall remain in full force and effect.

In witness of and in agreement with this Agreement's terms, the parties, by their duly authorized representatives, affix their respective signatures:

For Contractor: The Institute on Aging

DocuSigned by:
Roxana Blades
E3BF7ABD4A6448F...

5/30/2025

Roxana Blades

Contractor Signature

Date

Contractor Name (please print)

For County:

COUNTY OF SAN MATEO

By:
President, Board of Supervisors, San Mateo County

Date:

ATTEST:

By:
Clerk of Said Board

Exhibit A (Rev. 5/23/2025)

In consideration of the payments set forth in Exhibit B, Contractor shall provide the following services:

Objective:

Provide housing-related supports to Adult Protective Service (APS) clients who are homeless or are at imminent risk of homelessness as a direct result of abuse, neglect, self-neglect or exploitation.

Eligibility:

(1) Is an adult protective services client, is in the process of intake to adult protective services, or is an individual who may be served through a tribe, or tribal entity or agency, who appears to be eligible for adult protective services.

(2) Is homeless or at imminent risk of homelessness as a result of elder or dependent abuse, neglect, self-neglect, or financial exploitation, as determined by the adult protective services agency or tribal agency.

(3) Voluntarily agrees to participate in the program

Priority should be given to APS clients that are at imminent risk of homelessness due to abuse, neglect, self-neglect, or financial exploitation

Homeless or at risk of homelessness means any of the following:

(1) A person who lacks a fixed or regular nighttime residence and either of the following apply:

(A) The person has a primary nighttime residence that is a supervised publicly or privately operated shelter, hotel, or motel, designed to provide temporary living accommodations.

(B) The person resides in a public or private place not designed for, or ordinarily used as, a regular sleeping accommodation for human beings.

(2) A person who is in receipt of a judgment for eviction, as ordered by the court. Official notice of an eviction is not required.

(3) A person who has received a pay rent or quit notice or who will otherwise imminently lose their primary nighttime residence, which may include individuals who have not yet received an eviction notice, if all of the following are true:

(A) The right or permission to occupy their current housing or living situation will be, or there is credible evidence that it will be, terminated within 21 days after the date of application for assistance.

(B) A subsequent residence has not been identified or secured, including, but not limited to, an individual exiting a medical facility, long-term care facility, prison, or jail.

(C) The individual lacks the resources or support network, including, but not limited to, family, friends, or faith-based or other social network, needed to obtain other permanent housing.

(4) A person who has a primary nighttime residence (owned or rented by the client or living in a home without paying rent, live in a shared housing situation with others, or live in a hotel/motel as temporary shelter) or living situation that is either directly associated with a substantiated report of abuse, neglect, or financial exploitation or that poses an imminent health and safety risk, and the person lacks the resources or support network needed to obtain other permanent housing. An unsafe living situation is not a direct result of a substantiated report of abuse, neglect, or exploitation.

Compliance:

Contractor shall comply with WIC Section 15771 and Housing First requirements as described in

WIC Section 8255 and 8256 as well as any other Home Safe regulations. Contractor must notify County in writing at least 45 days in advance of any temporary or permanent interruption or end to Home Safe services for any reason.

Contractor shall provide:

I. Services

A. Provide Intensive Case Management services, consistent with Housing First principles, offer participants assistance in achieving housing stability. Housing related case management should include motivational interviewing and be consistent with a trauma informed approach.

Housing First means that individuals should be connected to housing or housing supports immediately without preconditions, services shall be voluntary, client choice shall be respected, and applicants shall not be rejected on the basis of income, past evictions, substance use, or any other behaviors that may indicate a lack of "housing readiness". Home Safe program needs to be operated in a manner consistent with SB 1380 and the core components of Housing First as enumerated in WIC Section 8255. Housing related case management should be provided in a manner consistent and in coordination with the APS service plan and may include, but is not limited to, the following activities in relation to supporting Home Safe client achieve and maintain housing stability:

- coordinating all components of a participant's housing service plan;
- working with family and community to identify any and all available supports related to housing stability;
- various forms of in-depth problem solving related to housing stability;
- assisting clients in applying for other public assistance and benefits to support housing stability, including assistance in accessing rent relief programs such as ERAP;
- assisting clients in applying for any monetary benefits available if not already on benefits: VA, SSA, SSI, GA, CAPI
- assisting clients in accessing physical and behavioral health services in order to support housing stability; and
- connections to benefits advocacy programs, such as HDAP, in order for Home Safe clients to achieve or maintain housing stability.

Home Safe housing related case management should complement but not replace or supplant traditional APS case management. Client participation in Home Safe case management is voluntary, but a client may be disenrolled from HS if they refuse to work with contracted case manager or refuse to communicate .

B. Housing Stabilization

Home Safe funding should be used to provide all Home Safe clients with housing stabilization services specific to their unique needs.

Examples of housing stabilization services and assistance may include, but are not limited to, any of the following:

- provision or connection to legal assistance
- eviction prevention
- tenant education
- credit repair coordination
- cleaning services
- hazard removal
- assistance with hoarding
- home repairs or modifications

Home Safe may include a crisis intervention to address an immediate health and safety issues related to housing. However, it is important to ensure clients are linked to longer term resources to avoid future housing related health and safety risks.

Connections to behavioral health programs may also be critical housing stabilization services. Housing stabilization services should be offered to all participants whether they are looking to stabilize in their current housing to prevent homelessness, relocating to new housing, or transitioning to other permanent supportive housing programs through the local Continuum of Care or residential care

placements for individuals in need of a higher level of care. Outcome of the referral to all those programs will depend on programs capacity to accept new participants and should not be considered as the only quality indicator of contractor's service provision.

C. Housing Navigation

Housing navigation is a critical component of Home Safe as it assists participants in finding, applying, securing, and moving into interim and permanent housing as needed.

Examples of housing navigation that should be provided as part of the Home Safe program include, but are not limited to:

- landlord engagement, including outreach.
- searching for housing based on client's housing preferences and mobility needs;
- building a resource of available units and matching clients to unit availability; according to their preferences for both interim and permanent housing options;
- assistance in completing housing applications;
- connection to core agency if a CES assessment has not been completed already or previous CES assessment was done more than 6 months ago;
- following up with CES on client's status with any shelter beds or housing voucher program
- coordination with the local public housing authority and advocating for availability of affordable housing vouchers for Home Safe clients;
- assistance in completing Assisted Living Waiver application when appropriate
- ensuring quality of housing placements; and
- assistance in making higher-level care placements, such as Adult Residential Facilities (ARFs) and Residential Care Facilities for the Elderly (RCFEs) or skilled nursing facilities, only when needed, and should be consistent with Olmstead principles.

D. Housing Direct Financial Assistance

Direct financial assistance represents all costs paid out on behalf of the participant related to housing. Direct financial assistance should be maximized to ensure clients provided housing or prevented from entering homelessness as quickly as possible. Examples of direct financial assistance includes, but is not limited to, any of the following:

- costs associated with rental assistance or mortgage payments (including shallow subsidies and enriched services funding to residential adult and senior care facilities)
Shallow rent subsidies may be provided until another stream of assistance is available. Bridge funding for longer-term care including use to provide enriched supportive services or auxiliary services in residential adult or senior care facilities when other funding is not available for this use. Higher care placements may include permanent supportive housing with intensive supportive services, Adult Residential Facilities (ARFs), and Residential Care Facilities for the Elderly (RCFEs), skilled nursing facilities and should be consistent with Olmstead principles
- rental backpay and arrearages
- application fees
- security deposits
- first and last months' rent
- housing rehabilitation and modification costs
- interim housing including hotel/motel stays or master leased units. Clients should not stay in hotels over 60 days. Contractor should find other housing options for clients after 60 days of hotel stay. Other guidelines around hotel stay include:
 1. Clients who is declined by CES (Coordinated Entry System) should not be eligible for hotel stays.
 2. Clients who can pay for hotel stays should contribute to the hotel stay. A typical guideline is one third of their income should go to the hotel stay.
 3. County (ADS) will pay for hotel services if client does not have the funds. As stipulated between ADS and IOA, Contractor will not be responsible for the provision of this service, liability or related payments. Contractor will assist with coordination of temporary placement including but not limited to transportation or other transitional care needs intended to support access to services.

- emergency shelter
- one-time emergency basic needs provided pursuant to evidence-based practices in homeless assistance and prevention
- provision of basic housing items and resources
- transportation vouchers related to housing needs
- costs associated with moving or relocating

E. Connections to Longer-Term Supports

Home Safe clients who require long term supports related to housing, such as supportive housing, should be referred to the local Continuum of Care (Core agency for CES assessment) for long term services to promote housing stability. Home Safe programs may serve clients through Home Safe in the interim, while awaiting services through the referral to the Continuum of Care, and Home Safe should work in close coordination with other systems of care or complimentary programs. Home Safe should also make referrals and coordinate services in order for clients to access physical and/or behavioral health assistance, as necessary and when appropriate.

II. Assessment Tools

County APS/EDAPT will conduct the assessment for eligibility and prioritization for Home Safe prior to making the referral to the contractor. Contractor is recommended to use an internally developed assessment tool to document the client's needs applying social work principles in general.

III. Determination of Eligibility

Eligibility will be determined by County. All cases referred to contractor will already have been determined as being eligible for Home Safe. In general, APS clients who are homeless or at imminent risk of homelessness as a result of elder or dependent abuse, neglect, or financial exploitation, as determined by APS are eligible to receive Home Safe services.

IV. Evidence-based practices

Contractor shall follow Housing First and Housing risk screening as evidence-based practices.

V. Intake process

Contractor shall reach out to potential Home Safe client within 3 business day after receiving referral from County. Contractor shall send progress report regarding client (if the client was contacted and status of services provided) within 2 weeks.

Contractor shall complete and send County the completed initial needs assessment and completed care plan within 5 weeks of referral. In addition, contractor CM shall review and discuss Hotel Acknowledgement form with client.

VI. Prioritization framework

Prioritization is determined by County. Referral to Contractor will have been screened and prioritized.

VII. Data Collection

1. Contractor shall receive referrals from ADS through a County application and shall send information such as monthly invoices and invoice supporting documents to County.
2. Contractor shall send County an excel spreadsheet required by State with related data elements on a quarterly basis.
3. Submit monthly report with client service details and reason for lack of services if no service were provided for that month.
4. ADS may request to have Contractor send Case Notes from time to time.
5. Contractor shall consistently track progress on metric such as:
 - Number of participants enrolled and duration of services
 - Types of assistance received by recipients
 - Housing status six months and one year after receiving assistance from the program
 - Number of individuals housed at program exit, including type of housing such as assisted living, stable/permanent housing, etc.
 - Number of individuals housed six months and one year after clients exit program
 - Number of participants needing intensive case management
 - Number of individuals who requested to terminate/discontinue receiving Home Safe services

Contractor shall do a 6 and 12 months follow up from the date the client receives services. Contractor shall inform ADS of the results.

VIII. Communication with clients

Contractor shall disclose below information to clients at the beginning of client receiving Home Safe services:

- Program is voluntary and client may exit the program at anytime.
- Client has the right to file a grievance with County at vnapoles@smcgov.org

Contractor shall disclose below information to clients at the end of client receiving Home Safe services:

- Contact information to San Mateo Coordinated Entry System.
- Provide contact information and continue to receive community resources provided.
- Encourage client to participate in a satisfaction survey provided by County.

IX. County's role

County shall provide below services prior to referring to Contractor:

- Screening for Home Safe eligibility
- Prioritization of cases
- Address issue related to suspected abuse and/or neglect. County may close the abuse/neglect case while Home Safe case is still open. County and Home Safe life cycle is independent of each other.
- Coordinate with contractor CM for a warm hand off on HS case (phone call or a joint visit)
- Complete hotel acknowledgement form, pending review of the form
- County will remain involved with participants who need financial support with hotel stays. County will manage payments and liability related risks with hotels as part of their agreements with those vendors.

X. Special conditions

A Home Safe client who is hospitalized will remain enrolled in the Home Safe program for as long as there is a discharge date. If there is no discharge date within a week of the hospital admission, the Home Safe case will be closed. Such disposition will be made in collaboration with APS/EDAPT.

XI. Case Worker qualifications

A Home Safe case worker should possess knowledge of general social work principles, local resources with emphasis on homelessness systems; the principles of diversity, equity and inclusion; knowledge of the need of specific geographic areas in San Mateo County (Coastal and rural).

XII. Payer's Last Resort

Contractor shall use existing community resources and client's own funds to pay for client's expenses such as Board & Care or on-going occupational therapy before using Home Safe Funds in the event that the lack of such services may put client in jeopardy for homelessness Prior authorization from County is required for such expenses. Please note that Payer of last resort model will delay contract's ability to follow housing first approach to care and services.

XIII. Racial Equity

Home Safe program requires contractor to commit to addressing racial disproportionality for people experiencing homelessness and ensure equitable provisions of services for Black and Indigenous individuals and other people of color who are disproportionately impacted by homelessness. Contractor shall review demographic data of Home Safe and APS clients and understand how program demographics compare to racial and ethnic makeup of low income and unhoused seniors in the community. Contractor shall review the following reports and resources related to racial equity:

Reports

- Racial Inequalities in Homelessness, by the Numbers - National Alliance to End Homelessness (NAEH)
- Supporting Partnerships for Anti-Racist Communities (SPARC) Phase One Study Findings - Center for Social Innovation

- A Brief Timeline of Race and Homelessness in America - Community Solutions
- Report and Recommendations of the Ad Hoc Committee on Black People Experiencing Homelessness - Los Angeles Homeless Services Authority
- Resources
- Racial Equity Toolkit: An Opportunity to Operationalize Equity - Local and Regional Government Alliance on Race and Equity (GARE)
- Equity-Based Decision-Making Framework - National Innovative Service
- Framework for an Equitable COVID-19 Homelessness Response - Housing Equity Framework
- Advancing Racial Equity through Assessments and Prioritization - U.S. Department of Housing and Urban Development.

XIV. Program Transition

Contractor shall begin transition activities 30 days prior to the end of the contract to ensure an orderly wind-down of the Home Safe program. To support this transition and ensure timely and appropriate care, Contractor shall not receive new client referrals within the final 30 days of the contract term except in the cases of emergencies or special conditions approved by San Mateo County.

Exhibit B (Rev. 5/23/2025)

In consideration of the services provided by Contractor described in Exhibit A and subject to the terms of the Agreement, County shall pay Contractor based on the following fee schedule and terms:

I. Provisions:

- A. Contractor shall submit a budget sheet segregated into direct and indirect costs and for the contract.
- B. Contractor shall maintain books, records, documents and other evidence pertaining to costs and expenses of the contract.
- C. Contractor's records shall be open for audit and review by county, state and federal agencies, including CDSS. Record shall be kept in the State of California for the retention period specified in the contract in accordance with state records retention regulations, Section 23-353.
- D. Firm-fixed price method of reimbursement is used for the purpose of Home Safe.
- E. No out of state travel will be allowed.
- F. No food or beverages will be allowed under Overhead costs.

II. Budget (See next page)

	Budget Term: 7/1/2024- 6/30/2025	Budget Term: 7/1/2026- 9/30/2026
Direct Program Services		
Manager	\$ 24,970.00	\$ 6,242.50
Supervisor	\$ 23,206.00	\$ 5,801.50
Care manager #1	\$ 80,573.00	\$ 20,143.25
Care manager #2	\$ 84,637.00	\$ 21,159.25
Care manager #3	\$ 82,605.00	\$ 20,651.25
Outreach Coordinator	\$ 15,250.00	\$ 3,812.50
Program Coordinator	\$ 13,293.00	\$ 3,323.25
Fringe benefits	\$ 81,134.00	\$ 20,283.50
Total Personnel Expenses	\$ 405,668.00	\$ 101,417.00
Operating expenses		
Office supplies	\$ 2,926.00	\$ 731.50
Travel	\$ 4,500.00	\$ 1,125.00
Occupancy	\$ 7,500.00	\$ 1,875.00
Equipment	\$ 8,000.00	\$ 2,000.00
Licenses & Fees	\$ 5,500.00	\$ 1,375.00
Meeting Expenses	\$ 1,500.00	\$ 375.00
Staff Training	\$ 2,500.00	\$ 625.00
Phone	\$ 1,200.00	\$ 300.00
Total operating expenses	\$ 33,626.00	\$ 8,406.50
Total Direct expenses	\$ 439,294.00	\$ 109,823.50
Overhead 15%	\$ 65,894.00	\$ 16,473.50
Housing and other services	\$ 194,812.00	\$ 48,703.00
Total	\$ 700,000.00	\$ 175,000.00

III. **Payments**

A. Maximum Obligation

In any event, the maximum amount that County shall be obligated to pay for all services provided under this Agreement shall not exceed EIGHT HUNDRED AND SEVENTY FIVE THOUSAND DOLLARS (\$875,000). \$700,000 must be spent by June 30, 2025. \$175,000 must be spent by September 30, 2025. Furthermore, County shall not pay or be obligated to pay more than the amounts listed for each component of service required under this agreement.

B. Invoice and Payment

Contractor shall be able to make budgetary changes with advanced notice to ADS. Administrative costs shall not exceed 15% of the budget.

Contractor will submit detailed invoices to the County on a monthly basis after program activities take place. County reserves the right to deny invoices for which completed invoices or electronic files are not received. Invoices may be emailed to ADS at vnapoles@smcgov.org

Contractor shall supply monthly invoice by the 15th of the following month according to below guidelines:

- Monthly invoice should be submitted with backup for expenses submitted for reimbursement. Each invoice will reflect the totality of the services rendered to the Home Safe clients for the month.
- Receipts for Direct Financial Assistance shall be submitted along with invoices
- If no costs were incurred for one month, please email ADS and inform County that there is no invoice to be submitted for that month.

C. Property (i.e. furniture) or equipment (computers, cameras, phones, etc.) purchase must be approved by County first prior to purchase for Home Safe program. 3 quotes must be submitted to County for procurement justification. Equipment purchase shall not exceed the amount indicated on budget.

D. No matching is required for Home Safe.

IV. **Fiscal monitoring**

- Contractor shall expend according to budget outlined in contract. If contractor wishes to modify budget line items or amount, contractor shall obtain County approval first.
- Contractor shall submit ledger for Home Safe program at 6 months, one year and end of contract.
- Contractor shall submit audited financial statement and fiscal policy manual at 6 months.
- Contractor shall submit backup documents for invoices as indicated under Payments section.
- County may perform fiscal site visit if deemed necessary

EXHIBIT C (Rev. 5/23/2025)

PERFORMANCE MEASURE

Contractor shall try to meet the below performance measures for Home Safe program:

- 100% of prioritized cases, marked by ADS/APS, will be responded to in an attempt to engage in housing stabilization and rehousing services via telephone within 3 business days (a voicemail left is counted as a contact) and will receive an in person visit within 10 business days if client agrees. Contractor shall send progress report regarding client (if the client was contacted and status of services provided) within 2 weeks. Contractor shall complete and send County the completed initial needs assessment and completed care plan within 5 weeks of referral. Contractor shall send County an excel spreadsheet required by the State with related data elements on a quarterly basis (following deadlines mentioned above). Submit monthly report with client service details and reason for lack of services if no service was provided for that month. Home Safe reports are to be completed by the 15th of each month, unless the 15th falls on a weekend and the Home Safe report will be due on the following business day.
- Contractor shall connect with San Mateo homeless continuum of care, attend Multi-Disciplinary Team (MDT) meetings and Disciplinary Team (MDT) meetings and interface with the SMC Coordinated Entry System (CES) and use those resources as the client's needs call for it.
- Satisfaction survey created by contracted agency with results showing certain percentage of satisfaction rate with the service. County can encourage contractor to include questions on equity.
- 30% of served Home Safe clients did not lose their housing due to Home Safe housing stabilization interventions
- 40% of served Home Safe clients gained financial ability/stability to keep themselves housed after receiving Home Safe services.
- 30% of served Home Safe clients found stable housing as a result of receiving Home Safe services.
- Target 50 -60 clients for the 12 months duration from July 1, 2024-June 30, 2025. 10 clients from July 1, 2025-September 30, 2025.
- Other metrics to meet State or County regulations/standards may be added but County will discuss with contractor prior to implementing these metrics.