



Shelbie Knox <sknox@clsocal.org> | DAILY, MIKELLE; Amy Goldman; Margaret Fu ▾

2:18

CLA SoCal Expanded Proposal for No-cost Legal Services...

i If there are problems with how this message is displayed, click here to view it in a web browser.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

[Bing Maps](#)

[+ Get more ap](#)

Hi Mikelle. Thank you again for contacting us. I think that "No-cost Legal Services for Low-Income Renters Facing Evictions or Residents Needing Assistance with Obtaining Public Benefits" is an excellent title.

Just to recap our conversation, CLA SoCal proposes to augment our proposal with a 1 FTE Staff Attorney from our Public Benefits Unit. This Staff Attorney would assist eligible Costa Mesa residents who have challenges in accessing or maintaining public benefits for which they are qualified. For example, these benefits could include programs such as Social Security, Supplemental Security Income (SSI), or Unemployment. These benefits can provide an economic lifeline to residents, giving them the financial stability they need to maintain housing or transition into new housing.

We seek to request an increase in funding to \$250,000/year. Each year, this would fund 100 clients, with a target of 37 housing clients from the original proposal, 35 benefits clients, and 28 same-day legal advice clients who have, or are facing, housing instability. With an average of 3.29 members per household, we anticipate this would impact more than 300 Costa Mesa residents annually.

Please don't hesitate to reach out if you have any questions. Thank you very much,
Shelbie

Shelbie Knox | Grants and Evaluation Manager

Pronouns: she/her/hers – [What's this?](#)

Community Legal Aid SoCal

2101 North Tustin Ave., Santa Ana, CA 92705

Direct: [1 \(714\) 571-5230](tel:17145715230) | **Santa Ana Office:** [1 \(714\) 571-5200](tel:17145715200) | **Fax:** [1 \(714\) 571-5270](tel:17145715270)



CONFIDENTIALITY NOTICE: This email message is intended only for the person or entity to which it is addressed and may contain information that is privileged, confidential, and/or otherwise protected from disclosure. Any unauthorized review, use, disclosure or distribution is prohibited. If you are not the intended recipient or believe that you received this message in error, please contact the sender by reply email and destroy all copies of the original message. If you are the intended recipient, but do not wish to receive communications through this medium, please so advise the sender immediately.



Community Legal Aid SoCal

Advocates for Justice in Orange and Los Angeles Counties

April 11, 2023

City of Costa Mesa
ATTN: Finance Department
77 Fair Drive
Costa Mesa, CA 92626

Dear Friends at the City of Costa Mesa:

On behalf of the Community Legal Aid SoCal (CLA SoCal) team, we thank the City of Costa Mesa for the opportunity to be considered for a new funding partnership under the City's HOME-ARP Housing Related Supportive Services for Qualifying Populations program.

CLA SoCal was founded in 1958 and has been bridging the justice gap for 65 years. Our practice areas and programs reflect the most pressing needs of the most vulnerable members of our communities, nearly all of whom are low-income, and many of whom are survivors of domestic violence, people with disabilities, people experiencing homelessness, people of color, people with limited English proficiency, and/or immigrants. At the root of our work is to increase access to legal services for individuals in need.

CLA SoCal's proposed HOME-ARP Housing Related Supportive Services for Qualifying Populations project will provide no-cost full-scope services in 37 housing cases (equating to ~100 unique individuals impacted) to improve housing stability for Costa Mesa residents, where there is no local government support for eviction defense. Our target population is low-income individuals and families at-risk of or experiencing homelessness with identified housing-related legal needs.

CLA SoCal's main office is located less than 10 miles from the City of Costa Mesa at:

- **Address:** 2101 North Tustin Avenue, Santa Ana, CA 92705
- **Phone Number:** (714) 571-5200

CLA SoCal does not anticipate utilizing subcontractors for this proposed project.

Many thanks to the City of Costa Mesa again for its consideration of this important work. Please reach out to our Grants and Evaluation Manager, Shelbie Knox if you have any questions about this project; she can be reached at sknox@clsocal.org or by phone at (714) 571-5230.

Warm regards,

Kate Marr
Executive Director

Background and Project Summary Section

The Background and Project Summary Section should describe your understanding of the City, the work to be done, and the objectives to be accomplished. Refer to Appendix A - Scope of Services, of this RFP.

The 2022 OC Point-in-Time count found that there were 208 housing insecure Costa Mesa residents, 150 unsheltered and 58 sheltered. While this number is relatively low in comparison to neighboring cities, supportive services remain limited. For individuals facing homelessness, seeking legal aid often falls to a low priority as they struggle to meet more critical basic needs.

To meet the guidelines of Appendix A – Scope of Services for this RFP, CLA SoCal’s proposed program will increase the availability of housing legal services through the following objectives:

OBJECTIVE #1: Expand access to housing-related legal services for 37 high-need Costa Mesa clients at risk of eviction during the grant period. CLA SoCal’s Housing team specializes in cases such as Section 8, Veterans Affairs Supportive Housing (VASH), Emergency Housing Vouchers (EHV) for domestic violence survivors, and Housing is Key rental assistance denials which are likely to spike once litigation ends. For a full description of potential services, please see page 2.

OBJECTIVE #2: Educate officials (elected and/or agency) around affordable housing and homelessness reduction strategies including subsidized housing, housing elements, rent control, and new laws banning discriminatory housing practices. This could include direct advocacy or provision of technical assistance to housing advocates in our region.

OBJECTIVE #3: Publicize the Housing program to social service providers, other legal organizations, domestic violence service providers, elected officials, etc. to continue expanding our network of referral systems. Utilize social media to inform the public about this work as well as provide 4 Know Your Rights presentations within the Costa Mesa community.

OBJECTIVE #4: Evaluate impact of project to extract best practices and make course corrections when warranted.

Housing-related legal services will be provided to individuals and families who meet the following qualifications: Homeless, as defined in 24 CFR 91.5 Homeless (1), (2), or (3); at-risk of Homelessness, as defined in 24 CFR 91.5 At risk of homelessness; fleeing, or Attempting to Flee, Domestic Violence, Dating Violence, Sexual Assault, Stalking, or Human Trafficking, as defined by HUD. 24 CFR 5.2003; other Populations where providing supportive services or assistance under section 212(a) of NAHA (42 U.S.C. 12742(a)) would prevent the family's homelessness or would serve those with the greatest risk of housing instability.

Services provided under this funding will be allocated to Costa Mesa homeless residents, as identified by an individual/family whose most recent permanent primary residence was in Costa Mesa, is a member of Costa Mesa's workforce, or has child(ren) attending a Costa Mesa school. Residence-eligibility and income-eligibility will be assessed during the trauma-informed intake and assessment process; for individuals who meet the qualifications of the Housing Related Supportive Services for Qualifying Populations program will be assigned to the Staff Attorney to-be hired utilizing these funds.

Method of Approach: *Provide a detailed description of the approach and methodology that will be used to fulfill each requirement listed in the Scope of Services of this RFP.*

An implementation plan that describes in detail (i) the methods, including controls by which your firm manages projects of the type sought by this RFP; (ii) methodology for soliciting and documenting views of internal and external stakeholders; (iii) and any other project management or implementation strategies or techniques that the respondent intends to employ in carrying out the work.

CLA SoCal has been providing housing-related legal services for more than fifty years; program services are fully implemented and proven to be successful. If awarded, our proposed Housing Related Supportive Services for Qualifying Populations program will not require an implementation phase as services for Costa Mesa residents are already in process. City of Costa Mesa funding will allow for program expansion to hire an additional Housing Unit Staff Attorney, which we anticipate will increase impact by 37 cases on an annual basis, supporting approximately 100 individuals including clients, their children, and other household members.

Projects already managed by CLA SoCal that are similar in scope to those proposed in this RFP are managed by the organization's experienced Housing Unit, which includes 2 Supervising Attorneys, 2 Senior Attorneys, 10 Staff Attorneys, and 8 Paralegals (with 2 Staff Attorney and 1 Paralegal positions currently vacant/being hired for). Impact data is collected by utilizing our case management system, SMS client surveys, and anecdotal evidence brought by our project team. The team then meets regularly to chart progress, but also to identify any problems and discuss the need for course correction or systemic changes. To ensure successful performance of contracts of this nature, CLA SoCal's Grants and Evaluation Manager and Director of Legal Services meet quarterly with the Supervising Attorney and Directing Attorney to assess the grant-funded work and program efficacy.

Detailed description of efforts your firm will undertake to achieve client satisfaction and to satisfy the requirements of the Scope of Services, Appendix A.

CLA SoCal's proposed Housing Related Supportive Services for Qualifying Populations program will provide no-cost legal services for low-income renters facing evictions in Costa Mesa. All potential clients are first screened for financial eligibility and legal conflicts by trauma-informed Intake and Assessment staff. Individuals whom we cannot serve are referred to other resources to receive support. For those whom we can serve, clients are provided with immediate legal advice, while clients who present more complex cases or are at-risk of immediate homelessness will be referred to the Housing team for brief or extended services. Extended services include document review and preparation and provision of advice and counsel at eviction defense clinics; draft answers to complaints and dispositive motions; propound and respond to discovery; argue motions before the court; take cases for full representation and possible trial; negotiate settlements; prepare emergency stays of eviction.

On behalf of clients, CLA SoCal will raise defenses for tenants who otherwise would not have done so due to lack of knowledge or intimidation. Assigned attorneys will fight frivolous evictions and unchecked abuses to help prevent tenants from signing unfair agreements. They will help

tenants remain in their homes and avoid the fallout of evictions including displacement, depression, illness, and instability.

Detailed project schedule, identifying all tasks and deliverables to be performed, durations for each task, and overall time of completion.

During the one-year grant term, CLA SoCal aims to manage an additional 37 housing-related cases specifically for Costa Mesa residents. Grant funds will support the hiring of a new Housing Staff Attorney to ensure the successful delivery of this project. In addition, grant funds will be partially allocated to (2) existing Staff Attorney roles and (1) existing Supervising Attorney role. CLA SoCal is committed to serving the Costa Mesa community as a collaborative partner by meeting with officials at the local level (e.g., housing authorities and city councils) and working with housing advocates to assist in local efforts.

To ensure the goal of 37 new cases is met, project deliverables during the grant term include:

- Perform holistic legal assessments for all tenants and provide referrals to additional legal services when appropriate.
- Educate tenants about their rights by providing 4 Know Your Rights workshops in languages requested by community partners to high need communities in Costa Mesa.
- Track changes in landlord/tenant laws and tenant protections, including those related to COVID-19, to ensure that the most up-to-date advice and strategy is provided.

Detailed description of specific tasks you will require from City staff. Explain what the respective roles of City staff and your staff would be to complete the tasks specified in the Scope of work.

CLA SoCal's proposed project does not require any tasks to be led by City of Costa Mesa staff.

Proposers are encouraged to provide additional innovative and/or creative approaches for providing the service that will maximize efficient, safe, and cost effective operations or increased performance capabilities.

CLA SoCal prides itself on uniquely serving the community through services rooted in language justice, meaning we increase meaningful participation for linguistically marginalized communities – communities whose members have historically faced challenges in engaging legal services and basic needs. To that end, CLA SoCal employs staff who are fluent in English, Korean, Spanish, and Vietnamese; for other languages, we utilize a language service that can provide translation in over 200 languages for our Hotline and in-person meetings. Additionally, CLA SoCal utilizes sign language interpreting services for our hearing-impaired clients. Our priority is to ensure that our non-English-speaking clients receive the same high-level service as our English-speaking clients.

This innovative approach to services empowers our organization to engage in meaningful dialogue driven by active listening and without judgment to ensure that clients feel heard and respected and are comfortable asking questions during the decision-making process regarding their legal matters.

Qualifications & Experience of the Firm:

Applying Agency: Community Legal Aid SoCal (CLA SoCal)

Address: 2010 N. Tustin Avenue, Santa Ana, CA 92507

State of Incorporation: California

Date of Incorporation: 05/09/1958

First Began Operations: 05/09/1958

First and Last Name of Board Officers can be found on page 14.

Founded in 1958, CLA SoCal provides free legal services to low-income families, individuals, and senior citizens in Orange and Los Angeles Counties. The name was legally changed from Legal Aid Society of Orange County in 2019. CLA SoCal is the largest legal aid provider in Orange County and is the only nonprofit legal aid organization with offices in southeast Los Angeles County.

CLA SoCal operates one of the largest free legal hotlines in the US, with more than a dozen staff who can field calls and online intake in several languages (in-house). Our Intake and Assessment Unit determines which cases are handled immediately with advice and counsel, and which are referred to litigation staff.

In 2022 CLA SoCal staff served clients in nearly 4,000 housing cases – a nearly 60% increase over 2019. During this time, CLA SoCal has worked to ensure that the Housing unit has the supervision, camaraderie, and structure its staff need to handle multiple grants and quickly evolving housing laws.

Our Systemic Impact Unit (SIU) helps our litigation units identify and advocate around systemic problems; over the past two years, their work has focused on systemic benefits advocacy, affordable housing advocacy, illegal housing practices, and protection of domestic violence survivors in the civil court system.

Developing strong systems for both mentorship and accountability were foundational objectives for our recent restructure. Our programmatic managers on this project, from Supervising Attorney to Director of Legal Services, have a wealth of experience ranging from ten years to thirty-six years of case handling in state and federal court. Additionally, all of these staff are experienced supervisors who participate in supervisorial training throughout the year, as well as leadership roundtables, case reviews, and evaluation.

CLA SoCal also has experienced Finance, Grants, and Operations/Data staff who help accurately and effectively administer and report on grants and monitor subrecipients.

CLA SoCal frequently attends community events throughout the county to publicize its work related to housing legal needs and to hand out multilingual fliers about our homelessness prevention efforts; in 2022, we attended 34 public housing events that included nearly 2,500 attendees. These events include bilingual staff to ensure that we are able to speak with attendees in the language which they prefer. CLA SoCal also participates in numerous coalitions and trainings that include service providers throughout Orange County. On these calls and in meetings, partners discuss their respective services with the goal of building referral networks and learning about third-party services that could benefit our clients.

List of Current and Previous Contracts Similar to Proposed Services

CLA SoCal currently maintains or has engaged in contracted partnerships within the last eight years with the following agencies to provide services similar to the requirements for Costa Mesa.

NOTE: contracts involving passthrough of federal ARP or CDBG** funding.*

- **County of Los Angeles Department of Consumer and Business Affairs Stay Housed/Eviction Defense Project** (passthrough grant via Legal Aid Foundation of Los Angeles (LAFLA)) – 2 contracts totaling \$1,662,006.
 - Contract Term: 7/30/20-3/31/21; 9/15/20-3/31/22; 5/13/22-6/30/23* (expected to be renewed)
 - Contract Contact Name & Title: Joanna Esquivel, Project Manager, LAFLA
 - Contract Contact Phone Number: jesquivel@lafla.org, 323.801.7964
 - Brief Description: Eviction defense services for 400+ residents of Los Angeles County annually.
- **State Bar of California Homelessness Prevention Grants** – six contracts totaling \$5,002,353.
 - Contract Term: 10/1/19-12/31/2021; 1/1/21-12/31/23; 12/1/2021-12/31/24*; 1/1/22-12/31/24*; 1/1/23-6/30/24
 - Contract Contact Name & Title: Chris McConkey, Supervisor, Program, Office of Access&Inclusion, State Bar of California
 - Contract Contact Phone Number: Christopher.McConkey@calbar.ca.gov, 213-765-1505
 - Brief Description: Homelessness prevention services including eviction defense, public benefits advocacy, and education for 1,000+ California residents annually.
- **City of Santa Ana Community Development Block Grant (CDBG)** – five contracts totaling \$234,363**
 - Contract Term: 7/1/17-6/30/2018; 7/1/18-6/30/19; 7/1/19-6/30/20; 7/1/20-6/30/22; 7/1/22-6/30/24
 - Contract Contact Name & Title: Brenda Vega, Community Development Analyst
 - Contract Contact Phone Number: BVega@santa-ana.org, (714) 647-6561
 - Brief Description: Domestic violence prevention services for 20-30 City of Santa Ana residents annually.
- **City of Norwalk CDBG** – six contracts totaling \$87,000**
 - Contract Term: 7/1/215-6/30/16; 7/1/16-6/30/17; 7/1/17-6/30/18; 7/1/18-6/30/19; 7/1/21-6/30/22; 7/1/22-6/30/23
 - Contract Contact Name & Title: Rosio Medina, Management Analyst
 - Contract Contact Phone Number: RMEDINA@norwalkca.gov; 562-929-5952
 - Brief Description: General legal services for City of Norwalk residents.

Key Personnel

- **Alisha Saska:** Supervising Attorney for CLA SoCal's Housing Unit.
 - Alisha has 10 years of experience providing low-income tenants with housing related legal advice. She has represented clients in eviction actions, section 8 termination hearings, and other landlord tenant disputes. Alisha currently supervises the Community Legal Aid SoCal's housing team.
- **Jonathan Gibson:** Orange County-focused Staff Attorney for CLA SoCal's Housing Unit.
 - Jonathan has been with CLA since 2020. He represents tenants in all aspects of eviction litigation including assisting them to prepare answers and representing them in unlawful detainer trials.
- **Negeen Sadeghi-Movahed:** Orange County-focused Staff Attorney for CLA SoCal's Housing Unit.
 - Negeen has been with CLA since 2021. She represents tenants in all aspects of eviction litigation including assisting them to prepare answers and representing them in unlawful detainer trials.
- **Vacant (to be filled with partial Costa Mesa funds):** Staff Attorney
 - The Housing Staff Attorney will work as a member of the housing team to serve and represent low-income and senior tenants who are facing eviction. The position requires working with individuals during moments of extreme stress and instability, and the provision of culturally sensitive and empathetic services.

ALISHA D. SASKA

Supervising Attorney | Community Legal Aid SoCal | (714) 571-5250 | asaska@clsocal.org

EDUCATION & PROFESSIONAL LICENSE

California State Bar License

December 2013

University of the Pacific, McGeorge School of Law

J.D. with Distinction

May 2013

Capital Certificate in Public Law and Policy and Certificate in Advocacy

Cedar Crest College

B.S., Chemistry and Political Science

May 2010

B.A., History, Minor in Economics

May 2010

CERTIFICATIONS AND TRAININGS

Mediation Certification, McGeorge School of Law

May 2013

Deposition Bootcamp, National Institute for Trial Advocacy

February 2015

Trial Advocacy Institute, National Institute for Trial Advocacy

October 2016

EXPERIENCE

Community Legal Aid SoCal

Supervising Attorney, Housing Unit

March 2020-Present

Oversaw the creation of the housing unit; Supervise a staff of 4 attorneys and 3 paralegals who assist clients regarding landlord tenant issues including evictions, subsidized housing, and mobile home assistance; Work with community partners to implement various projects including an Eviction Defense Program and a Pro Bono Eviction Defense Program; Represent tenants regarding issues with their landlords including eviction defense and administrative hearing representation; Engage in outreach including tenant know your rights presentations.

Staff Attorney

November 2019-March 2020

Organized and conducted housing clinics; Provided counsel and advice and limited scope services to clients; Researched and prepared pleadings including answers and settlement agreements; Negotiated settlements on behalf of tenants involved in eviction cases; Conducted full factual investigations and discovery including propounding and responding to interrogatories and requests for admissions and production of documents.

Legal Services of Northern California

Supervising Attorney

March 2018-November 2019

Staff Attorney

December 2013-March 2018

Reviewed closed cases related to housing issues for compliance with grant requirements; Edited and approved pleadings written by attorneys and interns before filing with courts and administrative agencies; Led case review meetings to develop case and litigation strategies; Conducted trainings, both internally and in the community; Provided counsel and advice to clients regarding landlord-tenant disputes, mortgage foreclosures, pensions, public benefits,

and educational rights in over 1500 cases; Drafted pleadings including answers, motions for summary judgment, and trial briefs; Conducted full factual investigations and discovery including interrogatories, requests for admissions and production of documents, and depositions; Represented clients in settlement negotiations and administrative hearings regarding public housing and public benefits; Represented clients in Unlawful Detainer Bench trials; Researched statutes, legislative history, precedent cases, and applicable regulations relating to housing law, mortgage foreclosures, and pensions; Organized and participated in targeted community outreach events and legal trainings.

Jonathan Gibson

1501 E. 37th Street, Long Beach, CA 90807 | (714) 612-2758 | JonathanGibson7@gmail.com

EDUCATION

Bar Admission: Member, California State Bar Association, December 2014; Member, Federal Bar Association, Central District of California

Georgetown University Law Center, Washington, DC

Juris Doctor, May 2014; GPA: 3.36

Chapman University, Orange, CA

Bachelor of Arts in Psychology with a minor in Business Administration, 2006

EXPERIENCE

Legal Aid Foundation of Los Angeles, Los Angeles, CA

Staff Attorney (November 2019 – Present)

Represent unhoused individuals in federal impact litigation to prevent the unlawful seizure of property without due process. Represent tenants in Section 8 administrative hearings and advocate for housing authorities to modify Administrative Plans to comply with the law. Assist tenants with housing issues such as habitability violations, illegal rent increase, and eviction.

Public Law Center, Santa Ana, CA

Staff Attorney (June 2016 – September 2019)

Represented tenants in unlawful detainer actions, Section 8 administrative proceedings, writ actions, and other landlord/tenant cases. Handled all cases as lead attorney and was responsible for representation at hearings, conducting depositions and other discovery, as well as negotiating favorable resolution of matters. Trained/supervised law fellows and law clerks.

Disability Rights Legal Center, Los Angeles, CA

Staff Attorney (October 2015 – May 2016)

Conducted legal research for motion practice under the Americans with Disabilities Act. Drafted written discovery and met with clients to prepare responses to written discovery.

Greater Bakersfield Legal Assistance, Bakersfield, CA

Staff Attorney, Sargent Shriver Program (August 2014 – September 2015)

Represented tenants in unlawful detainer proceedings. Responsibilities included all aspects of litigation such as discovery, negotiating settlements, motion practice, and trial.

DC Law Students in Court, Washington, DC

Student Attorney (August 2013 – May 2014)

Represented indigent clients in DC Civil and Landlord-Tenant Court. Responsibilities included all aspects of litigation including investigating housing code violations, conducting discovery, conducting legal research, and drafting all pleadings and motions for trial.

Language Skills: Conversational in Spanish

NEGEEN SADEGHI-MOVAHED

Hollywood, CA • 949-973-3991 • negeensadeghi@gmail.com

EDUCATION

Bar Admission: California, January 2021 / Bar Number: 334183

American University Washington College of Law Washington, D.C.

Juris Doctor May 2019

University of California, Los Angeles Los Angeles, CA

Bachelor of Arts in Political Science June 2015

EXPERIENCE

Strategic Legal Practices Los Angeles, CA

Associate Attorney, September 2021

Researching and drafting complex motions related to all stages of the case from complaint through trial. Appearing in court and arguing substantive motions before the court. Negotiating with opposing counsel to solve discovery disputes. Taking depositions of the person most knowledgeable for international corporations and defending depositions of plaintiffs in consumer protection disputes.

The Marble Law Firm Remote

Case Assessment Attorney May 2021 – September 2021

Interviewed six to eight potential clients per day determining all potential applicable family law claims, counterclaims, and defenses. Advised potential clients regarding the process and procedure for their relevant legal questions. Identified relevant information and anticipated evidentiary hurdles, objections, and potential responses.

Orange County Public Defender's Office Santa Ana, CA

Post-Bar Clerk in Writs and Appeals Unit March 2020 – May 2020

Drafted writs of mandate for misdemeanor cases regarding Pitchess/Brady issues. Wrote legal memoranda on OC Sheriff Department's wide-spread failure to log evidence per department policy. Certified Post-Bar Clerk in Felony Panel Unit August 2019 – November 2019 Researched issues related to de-facto arrest, illegal detention, and illegal searches. Drafted 1538.5 and 402 motions. Assisted supervising attorney with crafting trial strategy.

American University Washington College of Law Criminal Justice Clinic Washington, D.C.

Student Attorney August 2018 – January 2019

Represented juvenile and adult clients in Montgomery County Circuit Court and District Court. Conducted intake interviews with clients and interviewed witnesses to prepare for trial. Researched immigration consequences of juvenile convictions and burglary laws. Drafted and argued motions, wrote memoranda, and negotiated with prosecutors.

Language Skills: Farsi (conversational)

Financial Capacity

The City is concerned about proposers' financial capability to perform, and therefore, may request sufficient data to allow an evaluation of firm's financial capabilities.

CLA SoCal is happy to provide any requested information regarding our financial capability to perform the objectives of this project.

Disclosure

CLA SoCal does not have any past or current business and personal relationships with any current Costa Mesa elected official, appointed official, City employee, or family member of any current Costa Mesa elected official, appointed official, or City employee.

Sample Sub-recipient Agreement

CLA SoCal is in agreement with the sample Sub-recipient Agreement provided by the City of Costa Mesa and does not have any exceptions or conditions to the Agreement.

Checklist of Forms to Accompany Proposal

CLA SoCal has included the following forms found in Appendix D of the RFP, and has attached them in the following manner:

1. Vendor Application Form – 2 pages
2. Company Profile & References – 2 pages
3. Ex Parte Communications Certificate – 1 page
4. Disclosure of Government Positions – 1 page
5. Disqualifications Questionnaire – 1 page
6. Bidder/Applicant/Contractor Campaign Contribution – 1 page



VENDOR APPLICATION FORM

FOR

RFP NO. 23-15 HOUSING RELATED SUPPORTIVE SERVICES FOR QUALIFYING POPULATIONS

TYPE OF APPLICANT: ☒ **NEW** ☐ **CURRENT VENDOR**

Legal Contractual Name of Corporation: Community Legal Aid SoCal

Contact Person for Agreement: Kate Marr

Title: Executive Director **E-Mail Address:** kmarr@clsocal.org

Business Telephone: (714) 571-5200 **Business Fax:** (714) 805-7370

Corporate Mailing Address: 2101 N. Tustin Avenue

City, State and Zip Code: Santa Ana, CA 92705

Contact Person for Proposals: Shelbie Knox

Title: Grants and Evaluation Manager **E-Mail Address:** sknox@clsocal.org

Business Telephone: (714) 571-5230 **Business Fax:** (714) 805-7370

Is your business: (check one)

☒ **NON PROFIT CORPORATION**

☐ **FOR PROFIT CORPORATION**

Is your business: (check one)

☒ **CORPORATION**

☐ **LIMITED LIABILITY PARTNERSHIP**

☐ **INDIVIDUAL**

☐ **SOLE PROPRIETORSHIP**

☐ **PARTNERSHIP**

☐ **UNINCORPORATED ASSOCIATION**

Names & Titles of Corporate Board Members

(Also list Names & Titles of persons with written authorization/resolution to sign contracts)

| Names | Title | Phone |
|------------------|--|--------------|
| Mei Tsang | President, Attorney Board Director | 646.319.0172 |
| Lauren Grochow | President Elect, Attorney Board Director | 949.622.2746 |
| Nikki Miliband | Secretary, Attorney Board Director | 714.875.2956 |
| Jordan Martell | CFO, Attorney Board Director | 612.245.8725 |
| Allison Cuff | Board Director | 714.369.0397 |
| Jared Bunker | Attorney Board Director | 949.721.2957 |
| Esther Morales | Client Board Director | 714.253.8494 |
| Rita Okorogu | Client Board Director | 424.240.4772 |
| Alan Slater | At-Large Board Director | 714.791.3026 |
| Michael Behrens | Attorney Board Director | 714.791.3026 |
| Miryam Abitbol | Client Board Director | 714.791.3026 |
| Yashina Burns | Attorney Board Director | 808.343.9283 |
| Orchid Cameron | Client Board Director | 714.717.6349 |
| Jorge deNeve | Attorney Board Director | 323.537.7007 |
| Michelle Gourley | Attorney Board Director | 818.653.0688 |
| Andrew Gray | Attorney Board Director | 949.218.8470 |
| Lucas Hori | Attorney Board Director | 253.569.2238 |
| Jenni Katzer | Attorney Board Director | 510.910.6972 |
| Deirdre Kelly | Attorney Board Director | 949.463.5592 |
| Yuri de Jesus | Client Director | 323.867.4825 |
| Jonathan Little | Attorney Board Director | 949.724.1111 |
| Martha Mauricio | Client Director | 949.316.9590 |
| Teddy Nguyen | Attorney Board Director | 626.394.9943 |
| Rich Otera | Attorney Director | 310.779.3971 |
| Jigna Patel | Attorney Board Director | 949.609.5004 |
| Scot Rives | Attorney Board Director | 646.319.0172 |
| Teal Kent | Client Board Member | 714.369.0933 |
| Alex Shaw | Client Board Director | 949.304.9298 |
| Deborah Trelles | Client Board Director | 714.737.4074 |
| Anika Wilson | At-Large Board Director | 805.886.0120 |

Federal Tax Identification Number: [REDACTED]

City of Costa Mesa Business License Number: _____

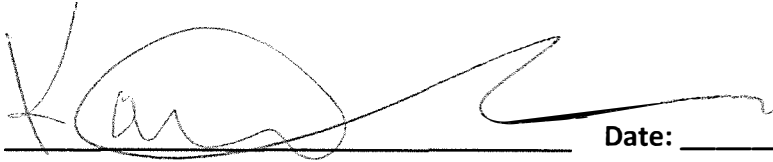
(If none, you must obtain a Costa Mesa Business License upon award of contract.)

City of Costa Mesa Business License Expiration Date: N/A

EX PARTE COMMUNICATIONS CERTIFICATION

Please indicate by signing below one of the following two statements. **Only sign one statement.**

I certify that Proposer and Proposer's representatives have not had any communication with a City Councilmember concerning informal **RFP No. 23-15 HOUSING REAL TED SUPPORTIVE SERVICES FOR QUALIFYING POPULATIONS** at any time after **March 27, 2023**.

 4/10/23
Date: _____

Signature

Kate Marr

Print

OR

I certify that Proposer or Proposer's representatives have communicated after **March 27, 2023** with a City Councilmember concerning informal **RFP No. 23-15 HOUSING RELATED SUPPORTIVE SERVICES FOR QUALIFYING POPULATIONS**. A copy of all such communications is attached to this form for public distribution.

Date: _____

Signature

Print

DISQUALIFICATION QUESTIONNAIRE

The Contractor shall complete the following questionnaire:

Has the Contractor, any officer of the Contractor, or any employee of the Contractor who has proprietary interest in the Contractor, ever been disqualified, removed, or otherwise prevented from bidding on, or completing a federal, state, or local government project because of a violation of law or safety regulation?

Yes ☐ No ☒

If the answer is yes, explain the circumstances in the following space.

DISCLOSURE OF GOVERNMENT POSITIONS

Each Proposer shall disclose below whether any owner or employee of Contractor currently hold positions as elected or appointed officials, directors, officers, or employees of a governmental entity or held such positions in the past twelve months. List below or state "None."

None.

COMPANY PROFILE & REFERENCES

Company Legal Name: Community Legal Aid SoCal

| | |
|---|---|
| Company Legal Status (corporation, partnership, sole proprietor, etc.) | Corporation - Non Profit 501(c)(3) |
| Active licenses issues by the California State Contractor's License Board: | N/A |
| Business Address: | 2102 N. Tustin Avenue, Santa Ana, 92507 |
| Website Address: | https://www.communitylegalsocal.org/ |
| Telephone Number: 714-571-5200 | Facsimile Number: (714) 805-7370 |
| Email Address: | info@clsocal.org |
| Length of time the firm has been in business: | 65 years |
| Length of time at current location: | 17 years |
| Is your firm a sole proprietorship doing business under a different name: | No |
| If yes, please indicate sole proprietor's name and the name you are doing business under: | N/A |
| Federal Taxpayer ID Number: | 95-1994337 |
| Regular Business Hours: | 9:00AM-5:00PM; Hotline: M-Th 9:00-6:00, F 9:00-noon |
| Regular holidays and hours when business is closed: | Closed New Year's Day, Martin Luther King Day, Presidents Day, Cesar Chavez Day, Memorial Day, Juneteenth, July 4th, Labor Day, Veterans Day, Thanksgiving (2 days), Christmas (2 days), New Year's Eve. Business closed Saturdays and Sundays; Hotline closed Friday afternoons. |

Contact person in reference to this solicitation: Shelbie Knox

| | |
|---|----------------------------------|
| Telephone Number: (714) 571-5230 | Facsimile Number: (714) 571-5270 |
| Email Address: sknox@clsocal.org | |

Contact person for Accounts Payable: Margaret Fu

| | |
|---|----------------------------------|
| Telephone Number: (714) 571-5233 | Facsimile Number: (714) 571-5270 |
| Email Address: mfu@clsocal.org | |

Name of Project Manager: Alisha Saska

| | |
|---|----------------------------------|
| Telephone Number: (714) 571-5250 | Facsimile Number: (657) 295-8608 |
| Email Address: asaska@clsocal.org | |

COMPANY PROFILE & REFERENCES (Continued)

Submit the company names, addresses, telephone numbers, email, contact names, and brief contract descriptions of at least three clients, preferably other municipalities for whom comparable projects have been completed or submit letters from your references which include the requested information.

| | |
|---|--|
| Company Name: <u>City of Santa Ana</u> | |
| Contact Name: | <u>Brenda Vega</u> |
| Contract Amount: | <u>Five Community Development Block Grants (CDBG) contracts totaling \$234,363</u> |
| Email: | <u>BVega@santa-ana.org</u> |
| Address: | <u>20 Civic Center Plaza, M-26, Santa Ana, CA 92701</u> |
| Brief Contract Description: | <u>Domestic violence prevention services for 20-30 City of Santa Ana residents annually.</u> |
| | |
| Company Name: <u>City of Norwalk</u> | |
| Contact Name: | <u>Rosio Medina</u> |
| Contract Amount: | <u>Six CDBG contracts totaling \$87,000</u> |
| Email: | <u>RMEDINA@norwalkca.gov</u> |
| Address: | <u>12700 Norwalk Boulevard, Room 12, Norwalk, CA 90650</u> |
| Brief Contract Description: | <u>General legal services for City of Norwalk residents.</u> |
| | |
| Company Name: <u>County of Los Angeles Department of Consumer and Business Affairs (passthrough via Legal Aid Fdn. of Los Angeles)</u> | |
| Contact Name: | <u>Joanna Esquivel</u> |
| Contract Amount: | <u>Two ARP contracts totaling \$1,662,006</u> |
| Email: | <u>jesquivel@lafla.org</u> |
| Address: | <u>320 W Temple St Room G-10, Los Angeles, CA 90012</u> |
| Brief Contract Description: | <u>Eviction defense services for 400+ residents of Los Angeles County annually.</u> |
| | |
| Company Name: _____ | |
| Contact Name: | _____ |
| Contract Amount: | _____ |
| Email: | _____ |
| Address: | _____ |
| Brief Contract Description: | _____ |
| | |
| Company Name: _____ | |
| Contact Name: | _____ |
| Contract Amount: | _____ |
| Email: | _____ |
| Address: | _____ |
| Brief Contract Description: | _____ |

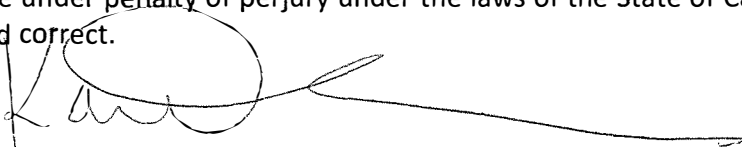
**BIDDER/APPLICANT/CONTRACTOR CAMPAIGN CONTRIBUTION
DISCLOSURE FORM**

Proposer/Consultant/Applicant is required to identify any campaign contribution or cumulative contributions greater than \$249 to any city council member in the twelve months prior to submitting an application, proposal, statement of qualifications or bid requiring approval by the City Council.

| Date | Name of Donor | Company/Business Affiliation | Name of Recipient | Amount |
|------|---------------|------------------------------|-------------------|--------|
| None | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

Except as described above, I/we have not made any campaign contribution in the amount of \$250 or more to any Costa Mesa City Council Member in the twelve months preceding this Application/Proposal.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.



Kate Marr, Community Legal Aid SoCal

Bidder/Applicant/Proposer

April 10, 2023

Date

CITY OF COSTA MESA

Rental Assistance and Homeless Prevention Program Proposal

MERCY  HOUSE

Proposal Contact:

Allison Davenport
Chief Strategy and Compliance Officer
PH: (714) 836-7188 x114
EM: allisond@mercyhouse.net
PO Box 1905 Santa Ana, CA 92702

TABLE OF CONTENTS

| | |
|----|--|
| 1 | COVER LETTER |
| 3 | VENDOR APPLICATION FORM |
| 5 | BACKGROUND AND PROJECT SUMMARY |
| 17 | COMPANY PROFILE & REFERENCES |
| 19 | EX PARTE COMMUNICATIONS CERTIFICATE |
| 20 | DISQUALIFICATIONS QUESTIONNAIRE |
| 21 | DISCLOSURE OF GOVERNMENT POSITIONS |
| 22 | BIDDER/APPLICANT/CONTRACTOR CAMPAIGN CONTRIBUTION |
| 23 | ATTACHMENT A; BOARD ROSTER |



April 10th, 2023

The City of Costa Mesa
77 Fair Dr.
Costa Mesa, CA 92626

SUBJECT: RFP No. 23-15

On behalf of Mercy House Living Centers, I am pleased to submit the following response to RFP No.23-15 for Housing-Related Supportive Services.

Mercy House has operated a Rental Assistance/Homeless Prevention Program continuously since 1999 and in that span of time has prevented over 6,000 people from entering homelessness. We have operated a successful rental assistance/homeless prevention program for the City of Costa Mesa between 2008-2019, utilizing federal HPRP funds and CDBG funding.

In addition to our direct experience administering a rental assistance program for the City of Costa Mesa, we also have histories of service with the Cities of Anaheim, Santa Ana, Garden Grove, Huntington Beach, Ontario and throughout Orange County as a more than 25 year Emergency Food and Shelter program grant recipient. This experience makes us well-poised to continue providing the City of Costa Mesa with such services.

Should we be fortunate enough to be awarded, Mercy House intends to utilize this funding to expand our current Homeless Prevention Program in the City, as well as shelter client support services through the Costa Mesa Bridge Shelter. Services will be provided to those at risk of eviction who would otherwise become homeless. Rental assistance will be provided to households within the specifications listed in this application. Shelter client support will be allocated towards clients who require assistance with landlord-tenant relations.

We have a long history of providing quality services for the City of Costa Mesa, including but not limited to:

- 23 years' experience, proven track record of providing rental assistance and homeless prevention programs
- Current operations that can easily scale to support the City of Costa Mesa

MERCY HOUSE

- Dedicated HPP hotline for those in need, will work with 2-1-1 and others to receive referrals
- Trained program managers with extensive knowledge of best practices
- Provide Gap Analysis assessment to serve as many as possible with limited resources

If awarded, Mercy House shall execute contracted activities from our administrative offices located at 203 N. Golden Circle, Santa Ana, CA 92701. These offices, located within five miles of Costa Mesa city limits, will be the location from which shall be officially managed. The general telephone number for these offices is (714) 836-7188. Parties relevant to this submission may be reached at their extension specified within this submission.

We thank you for your consideration.

Sincerely,



Larry Haynes
Chief Executive Officer



**VENDOR APPLICATION FORM
FOR
RFP No. 23-15 for HOUSING RELATED SERVICES FOR QUALIFYING POPULATIONS**

TYPE OF APPLICANT: ☐ NEW ☒ CURRENT VENDOR

Legal Contractual Name of Corporation: Mercy House Living Centers

Contact Person for Agreement: Allison Davenport

Corporate Mailing Address: PO Box 1905

City, State and Zip Code: Santa Ana, CA 92702

E-Mail Address: allisond@mercyhouse.net

Phone: (714) 836-7188 x114 Fax: (714) 836-7901

Contact Person for Proposals: Allison Davenport

Title: Chief Strategy and Compliance Officer E-Mail Address: allisond@mercyhouse.net

Business Telephone: (714) 836-7188 x114 Business Fax: (714) 836-7901

Is your business: (check one)

☒ NON PROFIT CORPORATION ☐ FOR PROFIT CORPORATION

Is your business: (check one)

☒ CORPORATION ☐ LIMITED LIABILITY PARTNERSHIP

☐ INDIVIDUAL ☐ SOLE PROPRIETORSHIP

☐ PARTNERSHIP ☐ UNINCORPORATED ASSOCIATION

Background and Project Summary

The background and Project Summary Section should describe your understanding of the City, the work to be done, and the objectives to be accomplished. Refer to Appendix A – Scope of Services, of this RFP.

Mercy House has provided services to nearly 90,000 individuals in the span of 30 years; we do this with a vision to “be a leader in ending homelessness by providing a unique system of dignified housing opportunities, programs, and supportive services.” Since its inception, Mercy House has grown from a small transitional housing program providing shelter and services to 10 homeless, single men at a time, to a complete system of care that meets the needs of thousands of men, women, and children every year. Our drive to adopt innovative, data driven strategies for ending homelessness have made us successful partners as we deliver effective homeless services, often in collaboration with like-minded agencies and multiple cities and jurisdictions.

Mercy House has operated a Rental Assistance/Homeless Prevention Program continuously since 1999 and in that span of time have prevented more than 6,000 people from entering the trauma of homelessness. We operated a successful rental assistance/homeless prevention program for the City of Costa Mesa between 2008-2019 utilizing federal HPRP funds and CDBG funding. Due to our long history of providing rental assistance services in the City, we are administratively versed with screening eligible applicants based on residency requirements and have a word-of-mouth presence in the City for residents in need.

In addition to our direct experience administering a Homeless Prevention program for the City of Costa Mesa, we also have histories of service with the Cities of Anaheim, Santa Ana, Garden Grove, Huntington Beach, Ontario, and throughout Orange County as a more than 25 year Emergency Food and Shelter program grant recipient. This experience makes us well-poised to continue providing Homeless Prevention services to Costa Mesa residents, as we already have trained staff, processes and procedures, marketing channels, and a dedicated hotline available.

Costa Mesa’s HOME-ARP funding will be utilized through the Costa Mesa Bridge Shelter, and allow Mercy House to expand its Homeless Prevention Program by providing housing-related services including financial assistance to low to moderate income residents of Costa Mesa, who are facing the imminent threat of homelessness. Funding will ensure that shelter guests at the Costa Mesa Bridge Shelter as well as Costa Mesa residents at-risk of homelessness receive assistance in removing barriers that would otherwise prevent them from obtaining stabilized housing, including rental assistance, and rent in arrears.

Method of Approach

Provide a detailed description of the approach and methodology that will be used to fulfill each requirement listed in the Scope of Services of this RFP. The section should include:

1. An implementation plan that describes in detail (i) the methods, including controls by which your firm manages projects of the type sought by this RFP; (ii) methodology for soliciting and documenting views of internal and external stakeholders; (iii) and any other project management or implementation strategies or techniques that the respondent intends to employ in carrying out the work.

The proposed HOME-ARP funding will be utilized through the Costa Mesa Bridge Shelter, and incorporated into our existing Homeless Prevention Program. This is a continuation/expansion of the current program in the City and is targeted to provide rental assistance and rent in arrears for homeless prevention. The program is estimated to serve 60 households this next year. Services include:

- Short-term rental Assistance, including rent in arrears
- Shelter Client Support, including landlord incentives
- Case Management
- Tenant Education
- Employment Coaching
- Assistance in obtaining income benefits, as well as referrals and service navigation

In addition to the services listed, staff will be trained in trauma-informed care and motivational interviewing, maximizing their ability to help clients see the benefit of a strong array of services. All delivered services will be geared toward long-term housing stability.

The program will be managed by Sandra Ramirez, who will be charged with overseeing the Housing Stability Specialist staff member. Sandra has been with Mercy House for nearly 5 years and has direct experience as a manager and case worker. She has been promoted to manager of various housing programs with us ever since due to her outstanding leadership and program success. Melissa Medina will serve as the Housing Solutions Administrative Manager tracking checks written, spending towards the budget and ensuring that the program adheres to budget, compliance and scope of service requirements. She has served in a similar capacity for the agency in our programs for over 5 years.

Marketing Plan

The program will be marketed through 2-1-1, other service providers, family resource centers, the City of Costa Mesa and to low-income apartment communities within the City of Costa Mesa.

Applicants

Staff will conduct an initial eligibility screening with the household to determine if they meet the eligibility criteria. If the applicant does not meet eligibility, they will be notified and connected to 2-1-1 for additional resource support. If eligibility is met, the client will be asked to complete an HMIS intake and provide supporting documentation including income, need and housing related documents. A Gap Analysis will be conducted to determine if there is any portion of rent the applicant can pay on their own and how many months of assistance may be needed up to a maximum of \$7,800 per household, or up to three months of past due, partial, or full rent, whichever is lesser. The Housing Stability Specialist will also make a connection with landlord to establish a contract and ability to accept third party payment. Mercy House will issue payments to the landlords directly.

Management of Funds

The Housing Stability Specialist will track all applicants on a Program Roster Report, noting their eligibility determination, when determination was issued to the applicants and documents that have been successfully received. The Administrative Manager will write all checks for the program and manage spending on the grant. This program management and tracking will enable Mercy House to report out at any time 1) how many applications were received, 2) how many were approved or denied, 3) how much funding has been dispersed to landlords, 4) how much is left for direct assistance, and the average amount of assistance provided to household. We will also track the number of total households and individuals served by the program as well as required demographic information in the HMIS system.

2. Detailed description of efforts your firm will undertake to achieve client satisfaction and to satisfy the requirements of the Scope of Services, Appendix A

Housing Stability Specialist functions as a case manager, providing primary oversight to participants on an individual basis and coordinating linkage to all services, both internal and external. Upon entry into the program, the Housing Stability Specialist will begin developing trust and rapport with the client in a multi-phased approach and start to build the clients' community of support to help make the transition from homelessness to housing more successful. The length of time between each phase varies depending on the needs and acuity-level of the client. Our rental assistance/homeless prevention programs are designed to successfully move clients through each phase as quickly as possible while still achieving a high success rate.

Mercy House recognizes that low-income households in need of rental assistance are often times those who are experiencing a housing crisis for the first time or are new to navigating housing services. They are most often desperate and fearful by the time they connect to us. Knowing this, we take customer support and customer satisfaction very seriously when implementing our rental assistance/homeless prevention programs and consider the end user experience.

With this in mind, we aim to provide housing-related service through the Costa Mesa Bridge Shelter and expand our Homeless Prevention Program for the City of Costa Mesa that ensures the following:

- 1) The program will be marketed to a wide-range of avenues so that those most in need are able to access the services available to them.
- 2) We have bilingual capabilities within our staff for those in need of assistance.
- 3) We provide clear information in terms of eligibility requirements and any documentation that we may need from each household to avoid confusion or frustration
- 4) We provide assistance on a first come, first serve basis in the order received to provide fair and equitable treatment of the limited households we can serve.
- 5) We communicate effectively with landlords on behalf of the households we serve and make timely rental payments once approved for assistance.
- 6) We employ social work best practices in our communication with households in need understanding the emotional and psychological impact of their current financial/housing crisis.
- 7) We have policies and procedures that enable households to file informal and formal grievances with our agency if they feel their needs have not been met by the program or our services.

3. Detailed project schedule, identifying all tasks and deliverables to be performed, durations for each task, and overall time of completion.

Mercy House has a historical record of successful Homeless Prevention programs, which makes us well equipped to continue providing these services. The proposed

program is an expansion of our current Homeless Prevention Program in the City, and is targeted to provide short term rental assistance, and rent in arrears for 60 qualified clients in the next fiscal year, as well as shelter client support in the form of leasing agreements with landlords. As this is an expansion/continuation of the program, a Housing Stability Specialist is prepared to continue project activities, the services thereof to be offered until the end of the grant term or until funds for the project have been depleted. Rental assistance provided through the project will continue for duration of up to three months or less, depending on the individual household's capacity to stabilize. The program will also be set up in the Orange County HMIS system to track client information and program outcomes for reporting purposes.

4. Detailed description of specific tasks you will require from City staff. Explain what the respective roles of City staff would be to complete the tasks specified in the scope of work.

Mercy House anticipates that it will rely on city staff in order to:

- Receive reports and invoices for this project
- Specify information to be included in quarterly reports
- Help market the program through whatever channels the City may have available
- Send referrals to the program from inquiries received by the City

Mercy House does not anticipate that it will require city staff to perform duties in relation to the scope of work other than those outlined above.

5. Proposers are encouraged to provide additional innovative and/or creative approaches for providing the service that will maximize efficient, safe, and cost-effective operations or increased performance capabilities.

Our marketing plan for the program is creative in that it attempts to utilize a number of existing platforms that are well known in the community but not limited to 2-1-1 Orange County to ensure the maximum reach to those in need.

Like our other Homeless Prevention Programs we operate, we will use a Gap Analysis Tool to see if there is any amount of rent that the client is able to pay on their own in order to attempt to stretch funding, and serve as many households as possible.

Lastly, we will use the Homeless Management System (HMIS) to track all clients served by the program. Standard and adhoc reporting capabilities from the system will enable us to look at longer term results of the program including whether or not program participants became homeless after our assistance ended or were able to maintain their housing.

Qualifications and Experience of the Firm

Describe the qualifications and experience of the organization or entity performing services/project within the past eight years that are similar in size and scope to demonstrate competence to perform these services. Information shall include:

1. If the owner is a corporation please provide: Name of corporation, corporate office street address, city, state, and zip code, state where incorporated, date of incorporation, first and last name of officers, local office address, city, state, & zip and the date local office opened its doors for business.

Mercy House Living Centers is a 501(c)3 non-profit entity operating out of administrative offices located at 203 N Golden Circle, Santa Ana, CA 92701. Mercy House Living Centers was incorporated under the name Mercy House Transitional Living Centers on July 1, 1988 in the state of California. Our local office is the same as our administrative headquarters and first opened in September 2019. Officers of Mercy House include Larry Haynes (CEO), Patti Long (COO), Timothy Huynh (Chief Program Officer), Linda Wilson (Chief Housing Officer), Allison Davenport (Chief Strategy and Compliance Officer), and Mary Ellen Gross (Controller).

2. If the owner is a partnership or joint venture, please provide: Name of partnership or joint venture, principal officer street address, city, state, and zip code, state of organization, date of organization, first and last name of general partners, local office address, city, state, and zip code, and date local officer opened its doors for.

This question is not applicable to Mercy House

3. List all businesses owned or controlled by yourself (applicant) or business manager doing similar business in California under another name. List business name and address and specify who owns or controls the business (e.g. self, business manager, etc.)

Mercy House CHDO, Inc. is the housing development arm of Mercy House Living Centers. It's employees Executive Director, Larry Haynes and Housing Director, Linda Wilson are also employees of Mercy House Living Centers. Mercy House CHDO, Inc. is a separate 501(c)(3) organization with a Board of Directors separate from the Board of Directors of Mercy House Living Centers.

4. List all businesses for which you or your business manager is or was an officer, director, or partner doing similar business in California under another

name. List business name and address, title, date(s) in position; specify who was in position (e.g. self, business manager, etc.)

Mercy House CHDO, Inc. is the housing development arm of Mercy House Living Centers. It's employees Executive Director, Larry Haynes and Housing Director, Linda Wilson are also employees of Mercy House Living Centers. Mercy House CHDO, Inc. is a separate 501(c)(3) organization with a Board of Directors separate from the Board of Directors of Mercy House Living Centers.

5. How many years have you been in business under your present business name?

Since our official change of name in 2009, Mercy House Living Centers has provided services under its current name for 13 years. Prior to that Mercy House Transitional Living Centers was providing services starting 1990.

6. Provide a list of current and previous contracts similar to the requirements for Costa Mesa, including all public agencies served (if any). For each, provide a brief description of the scope of work performed, the length of time you have been providing services, and the name, title, and telephone number of the person who may be contacted regarding your organization's service record. Provide a sample of each background investigation for each contract.

Mercy House has been providing Homeless Prevention services for 23 years and in that time has held numerous contracts to provide such services. As a small sample of work we have done in this regard, please see the five contracts and their details listed below:

1. City of Ontario

Timeline: 2007-current

Contact, Title, and Phone: Katyrna Gonzalez, Housing Director, (909) 395-2322

Scope of Work: Mercy House has provided a variety of homeless service programs for the City of Ontario continuously since 2007. These programs include Street Outreach, an Access Center, Homeless Prevention, Interim Housing, Tenant-Based Rental Assistance Program, Permanent Housing with Supportive Services, and Housing Management services.

2. City of Costa Mesa

Timeline: 2008-current
Contact, Title, and Phone: Mike Linares, CDBG/HOME Coordinator, (714) 754-5678

Scope of Work: Mercy House operated a Homeless Prevention and Rapid Rehousing Program for the City of Costa Mesa continuously since 2008 and became operators of the Costa Mesa Bridge Shelter in 2019.

3. City of Santa Ana

Timeline: 2008-current

Contact, Title, and Phone: Terri Eggers, Homeless Services Manager (714) 647-5378

Scope of Work: Mercy House has provided a Homeless Prevention Program for the City since 2008. Additionally, we provide Rapid Rehousing and Emergency Shelter in partnership with the City.

4. City of Anaheim

Timeline: 2008-current

Contact, Title, and Phone: Albert Ramirez, Project Manager (714) 765-4300 X 4826

Scope of Work: Mercy House has provided a Homeless Prevention Program for the City since 2008. We recently expanded to include a COVID-response Homeless Prevention Program. Additionally, we provide a HOME funded Tenant Based Rental Assistance Program for the City.

5. City of Garden Grove

Timeline: 2016-current

Contact, Title, and Phone: Nate Robbins, Senior Program Specialist (714) 741-5206

Scope of Work: Mercy House has provided a Homeless Prevention Program for the City since 2016 and expanded services to include a COVID-response Homeless Prevention Program. Additionally we provided a HOME funded Tenant Based Rental Assistance Program for the city.

7. Submit a description of the organization's qualifications, experience and abilities that make it uniquely capable to provide the services specified in the Scope of Work.

Since 1999, Mercy House has continually operated a Homeless Prevention program and in that time has served more than 2,700 households, including over 6,000 individuals. As a testament to our Homeless Prevention Program success, to date we have served 159 households, including 231 individuals for FY 22-23. Our fiscal year ends on June 30, 2023 and we anticipate our Homeless Prevention Program to serve approximately 165 households.

The main sources of funding for this program are CDBG, ESG, EFSP, TBRA, private grants and general funds. We work closely with funding cities, 2-1-1, other ESFP-funded agencies, as well as low-income apartment complexes throughout Orange County to receive referrals to the program. Participants in the program receive short-term rental assistance and housing stabilization case management. We utilize a progressive engagement approach to these services to best utilize limited resources. A gap analysis tool is used to compare the household's income versus expenses. This

helps us determine the length of assistance that may be needed as well as any portion of rent that the client may contribute to. Traditionally, clients are recertified for additional assistance every 3 months based on continued need.

We have extensive experience in administering and utilizing federal housing and homeless service funds including ESG, CoC, CDBG, HPRP, NSP, EFSP, HOME, HOPWA grants and various state and local funds. To ensure that we maintain adequate controls in our accounting systems and compliance to all applicable federal regulations, we complete an annual financial audit by an outside firm. We have a demonstrated ability and history of satisfactory capacity and timely drawdowns and single A-133 audits. Our finance and compliance teams regularly attend trainings, seminars, and workshops to stay up to date on regulations for managing the public funds that support our various programs. In addition to our regular annual audit, Mercy House also undergoes several monitoring visits by local jurisdictions that fund our programs and/or by HUD representatives. We have never had any major findings against our agency or programs. When concerns arise, we make modifications to our internal controls to make necessary corrections in a timeline manner and within the timeframe requested by the monitor. We are in good standing with all our federal and private funders. The staff who will be overseeing all of the HOME-ARP funded programs have more than 100 years of combined experience working with homeless and at-risk populations and serve in a number of leadership roles throughout Orange County.

8. The City of Costa Mesa is interested in knowing how Proposers support the communities that they serve. Please provide information on your organization's participation in local community, charitable and civic organizations and events, including membership in the Costa Mesa Chamber of Commerce, charitable contributions made by your organization, etc.

Mercy House has a strong history of working in and with the City of Costa Mesa. Through these efforts we have been recognized by City staff and officials for our service to the homeless in the community. Our presence and history with the City of Costa Mesa includes:

- Our Executive Director is a long-time resident of Costa Mesa and has extensive knowledge of the needs of not only the homeless in the City but also that of home owners, businesses and other city stakeholders;
- We have been a subrecipient of Costa Mesa CDBG Public Service grants for more than 17 years to operate transitional shelter, homeless prevention and rapid rehousing programs with a history of meeting spending and reporting deadlines and scope of services;

- In 2009, Mercy House was chosen as one of the only two agencies to partner with the City of Costa Mesa to operate a homeless prevention and rapid rehousing program exclusively to Costa Mesa residents;
- We have secured more than \$600,000 in California State Emergency Shelter funding, which the City would not otherwise be entitled to, to exclusively provide Costa Mesa homeless residents with Rapid Rehousing services;
- We have worked as a consultant to help the City create the Costa Mesa Homeless Task Force spawning the current Network for Homeless Solutions;
- We partnered with Vanguard University to conduct a homeless enumeration study for the City;
- We worked with City staff to create a transportation program to bus homeless residents to the Santa Ana Armory Shelter facility;
- We provided housing relocation assistance to guests of the Costa Mesa Motor Inn after its shut down;
- We have provided City staff and Council support in planning efforts and community town hall discussions around permanent supportive housing opportunities within the city;
- We are active members of the Network for Homeless Solutions and have a working relationship with the Lighthouse Church.
- We contracted for over 6 years with the City to provide homeless street outreach in conjunction with the City's community outreach workers and together have created a seamless outreach service delivery model.
- In 2019, through a competitive process we became operators of the Costa Mesa Bridge Shelter

Financial Capacity

The City is concerned about bidders' financial capability to perform, therefore, may ask you to provide sufficient data to allow an evaluation of firm's financial capabilities.

Mercy House welcomes any and all inquiries regarding its financial health and capacity.

Key Personnel

It is essential that the Proposer provide adequate experienced personnel, capable of and devoted to the successful accomplishment of work to be performed under this contract. This Proposer must agree to assign specific individuals to the key positions.

1. Identify the members of the staff who will be assigned to act for Proposer's firm in key management and filed positions providing the services described in the Proposal, and the functions to be performed by each.

2. Include resumes or curriculum vitae of each such staff member, including name, position, telephone number, email address, education, and years and type of experience. Describe for each such person, the relevant transactions on which they have worked.

Timothy Huynh, Chief Program Officer – Timothy graduated with a Master's degree in Mathematics, which makes him well-versed in analytics and systems-level thinking. Prior to his current role with Mercy House which began in January 2020, Timothy was a former employee with Mercy House's Development Team for 4 years rising to the ranks of Director of Grant Compliance and Data and overseeing the agency's public grants and compliance program. As Chief Program Officer, Timothy oversees a significant portfolio of program and development activities as well as serves as a critical member of the executive management team. He directly supervises six directors working to build their skills and confidence so that they can mentor, encourage, and motivate other staff. The portfolio includes: 1) Strategic Leadership and Special Initiatives; 2) Program Oversight including Emergency Shelter and Services, Housing Strategies, Permanent Supportive and Rapid Rehousing Programs; and 3) Development Activities. He may be reached at timothyh@mercyhouse.net or by phone at 714-836-7188 x 132

Allison Davenport, Chief Strategy and Compliance Officer – Allison has been with Mercy House for over 12 years. She holds a Bachelor of Arts in Anthropology from Cal State Fullerton. Allison is responsible for ensuring effective and compliant service delivery of existing and expansion projects. She manages the agency's public and private grants including procurement, compliance, contracts, and reporting. She also manages and oversees the agency data and program evaluation. She may be reached at allisond@mercyhouse.net or by phone at 714-836-7188 x 114

Carmen Brooks, Data Manager – Serving as Mercy House's Data Manager, Carmen has been with our agency for three years, serving as a Data Analyst and moving up to Data Manager. She holds a Bachelor of Science in Information Technology from University of Maryland and a Master's of Business Administration. Carmen has multiple years of data and personnel management experience across the fields of healthcare, housing, and homeless services. She may be reached at carmenb@mercyhouse.net.

Melissa Medina, Housing Solutions Administrator –Melissa has five years of experience working with homeless and at-risk populations at Mercy House and holds a Bachelor's Degree in Economics. Melissa's primary responsibilities include program management, including budgets, expenditures, and outcomes. She is responsible for leading the team

to meet our program goals, increase their professional development, and assure quality control of our services. She may be reached at melissam@mercyhouse.net or by phone at 714-836-7188 x 102.

Sandra Ramirez, Housing Solutions Manager – Sandra has several years of experience working with homeless and at-risk populations at Mercy House. As the Program Manager, she is responsible for supervising the Housing Stabilization Case Managers, ensuring quality and compliant service delivery, overseeing quality control of case files, and providing support and guidance to case managers when necessary. She may be reached at sandrar@mercyhouse.net or by phone at 714-836-7188 x 251.

TBD, Housing Stability Specialist – This position will process incoming applicants, determine eligibility and client need, and coordinate the delivery of rental assistance to Homeless Prevention Households. Services provided by this position will include: marketing the program to identified channels, conducting an initial needs assessment and determining household rent burden; collaborating with landlords to develop payment schedules and determine arrears, if appropriate; coordinating with the City to process incoming referrals; connecting program invoices to appropriate accounting staff; and communicating with appropriate data personnel for household enrollment into the HMIS system. This individual will report directly to the Housing Solutions Manager, Sandra Ramirez, who may be reached at sandrar@mercyhouse.net or by phone at 714-836-7188 x251.

Cost Proposal

Provide a structured cost proposal in a separate cost file. The cost file shall include standard hourly fee schedule, inclusive of all anticipated applicable fees for the types of projects described in this RFP and include classifications or services that can be provided by the proposer.

Proposals shall be valid for a minimum of 180 days following submission.

Please see the cost proposal included as a separate file.

Disclosure

Please disclose any and all past or current business and personal relationships with any current Costa Mesa elected official, appointed official, City employee, or family member of any current Costa mesa elected official, appointed official, or City employee. Any past or current business relationship may not disqualify the firm from consideration.

Mercy House is not aware of any past or ongoing business relationships between itself and affiliates of the City, their family members, or their businesses.

Names & Titles of Corporate Board Members

(Also list Names & Titles of persons with written authorization/resolution to sign contracts)

| Names | Title | Phone |
|---------------------|--------------------------------|----------------------------|
| <u>Larry Haynes</u> | <u>President</u> | <u>(714) 836-7188 X101</u> |
| <u>Patti Long</u> | <u>Chief Financial Officer</u> | <u>(714) 836-7188 X104</u> |
| <u>Jacob Mize</u> | <u>Secretary</u> | <u>(714) 836-7188 X142</u> |

Please reference Attachment A for a full list of Board Members

Federal Tax Identification Number:

City of Costa Mesa Business License Number: In process of obtaining

(If none, you must obtain a Costa Mesa Business License upon award of contract.)

City of Costa Mesa Business License Expiration Date: In process of obtaining

COMPANY PROFILE & REFERENCES

Company Legal Name: **Mercy House Living Centers**

Company Legal Status (corporation, partnership, sole proprietor etc.): **Corporation**

Active licenses issued by the California State Contractor's License Board: **Business, Non-profit**

Business Address: **807 N. Garfield Street Santa Ana, CA 92702**

Website Address: **www.mercyhouse.net**

Telephone Number: **(714) 836-7188**

Facsimile Number: **(714) 836-7901**

Email Address: **allisond@mercyhouse.net**

Length of time the firm has been in business: **33 years**

Length of time at current location: **15 years at business address listed, 33 years in Santa Ana**

Is your firm a sole proprietorship doing business under a different name: ____ Yes **X** No

If yes, please indicate sole proprietor's name and the name you are doing business under:

Federal Taxpayer ID Number: **[REDACTED]**

Regular Business Hours: **9AM-5PM, Monday through Friday**

Regular holidays and hours when business is closed: **All other times, including legal holidays**

Contact person in reference to this solicitation: **Allison Davenport**

Telephone Number: **(714) 836-7188 x114**

Facsimile Number: **(714) 836-7901**

Email Address: **allisond@mercyhouse.net**

Contact person for accounts payable: **Mary Ellen Gross**

Telephone Number: **(714) 836-7188 x125**

Facsimile Number: **(714) 836-7901**

Email Address: **maryelleng@mercyhouse.net**

Name of Project Manager: **Sandra Ramirez**

Telephone Number: **(714) 836-7188 x251**

Facsimile Number: **(714) 836-7901**

Email Address: **sandrar@mercyhouse.net**

COMPANY PROFILE & REFERENCES (Continued)

Submit the company names, addresses, telephone numbers, email, contact names, and brief contract descriptions of at least three clients, preferably other municipalities for whom comparable projects have been completed or submit letters from your references which include the requested information.

Company Name: City of Ontario, Housing and Neighborhood Preservation Agency

Contact Name: **Katryna Gonzalez, Housing Director**

Contract Amount: **\$1,500,000 annually**

Email: **kgonzalez@ontarioca.gov**

Address: 208 West Emporia Street, Ontario CA 91762

Brief Contract Description: Mercy House has provided a variety of homeless service programs for the City of Ontario continuously since 2007. These programs include Street Outreach, an Access Center, Homeless Prevention, Interim Housing, Tenant-Based Rental Assistance Program Permanent Housing with Supportive Services, and Housing Management services.

Company Name: City of Costa Mesa, Housing and Community Development

Telephone Number: **(714) 754-5678**

Contact Name: **Mike Linares, CDBG/HOME Coordinator**

Contract Amount: \$135,000 over time

Email: **MIKE.LINARES@costamesaca.gov**

Address: **77 Fair Dr, Costa Mesa, CA 92626**

Brief Contract Description: Mercy House operated a Homeless Prevention and Rapid Rehousing Program for the City of Costa Mesa between 2008-2019.

Company Name: City of Santa Ana

Telephone Number: (714) 647-5378

Contact Name: **Terri Eggers, Homeless Services Manager**

Contract Amount: \$90,000-\$130,000 annually

Email: **teggers@santa-ana.org**

Address: 20 Civic Center Plaza M-25, Santa Ana, CA 92701

Brief Contract Description: **Mercy House has provided a Homeless Prevention Program and Rapid Rehousing Program for the City continuously since 2008.**

EX PARTE COMMUNICATIONS CERTIFICATION

Please indicate by signing below one of the following two statements. **Only sign one statement.**

I certify that Proposer and Proposer's representatives have not had any communication with a City Councilmember concerning informal **RFP No. 23-15 HOUSING REALTED SUPPORTIVE SERVICES FOR QUALIFYING POPULATIONS** at any time after **March 27, 2023**.



Signature

Date: 4/10/2023



Print

OR

I certify that Proposer or Proposer's representatives have communicated after **March 27, 2023** with a City Councilmember concerning informal **RFP No. 23-15 HOUSING RELATED SUPPORTIVE SERVICES FOR QUALIFYING POPULATIONS**. A copy of all such communications is attached to this form for public distribution.

Signature

Date: _____

Print

DISQUALIFICATION QUESTIONNAIRE

The Contractor shall complete the following questionnaire:

Has the Contractor, any officer of the Contractor, or any employee of the Contractor who has proprietary interest in the Contractor, ever been disqualified, removed, or otherwise prevented from bidding on, or completing a federal, state, or local government project because of a violation of law or safety regulation?

Yes _____ No ☒

If the answer is yes, explain the circumstances in the following space.

DISCLOSURE OF GOVERNMENT POSITIONS

Each Proposer shall disclose below whether any owner or employee of Contractor currently hold positions as elected or appointed officials, directors, officers, or employees of a governmental entity or held such positions in the past twelve months. List below or state "None."

None

**BIDDER/APPLICANT/CONTRACTOR CAMPAIGN CONTRIBUTION
DISCLOSURE FORM**

Proposer/Consultant/Applicant is required to identify any campaign contribution or cumulative contributions greater than \$249 to any city council member in the twelve months prior to submitting an application, proposal, statement of qualifications or bid requiring approval by the City Council.

[illegible]

Except as described above, I/we have not made any campaign contribution in the amount of \$250 or more to any Costa Mesa City Council Member in the twelve months preceding this Application/Proposal.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Bidder/Applicant/Proposer

Date _____

MERCY HOUSE

ATTACHMENT A

BOARD ROSTER

MERCYHOUSE

BOARD OF DIRECTORS

Raymond M. Bukaty, Chair

1 Corona
Irvine, CA. 92603
949-854-4241 Home
949-636-0939 Cell
ray.bukaty@gmail.com
Affiliation: Retired Attorney
Term: 18 Years

Tim Clyde, Vice Chair

Katzkin Automotive Leather
2 Hermosa
Irvine, CA 92620
714-544-7371 Home
714-813-9119 Mobile
timclyde63@gmail.com
affiliation: CEO
Term: 12 Years

William E. Baker, Jr., Assistant Secretary

18301 Hillcrest Avenue
Villa Park, CA 92861
714-998-1232 Home
wbaker@lawbaker.com
Affiliation: Attorney
Term: 33 Years

Gary R. Belz

11 Mallard
Irvine, CA 92604
949-551-2783 Home
714-978-1300 Office
714-795-5350 Fax
gbelz53@gmail.com
Affiliation: Certified Public Accountant
Term: 33 Years

Mia Bergman

Kairos Investment Management
28211 Foxwood
Mission Viejo, CA 92692
708-870-6475 Cell
Maria.m.bergman@gmail.com
Affiliation: CPA
Term: 2

James Brooks

PO Box 1905
Santa Ana, CA 92702
714-836-7188 x107 Office
jamesb@ymercyhouse.net
Affiliation: Homeless Advocate and formerly
homeless individual

David Brust

Clifford & Bradford
1800 19th St.
Bakersfield, CA 93301
661-428-4834 Cell
dbrust@cliffordandbradford.com
Affiliation: Producer
Term: 1 Years

Johnny Bryant

ASL Electric
21791 Sweetgrass Circle
Lake Forest, CA 92630
Affiliation: Owner
949-343-3018 Cell
JBryant@aslelectric.com
Term: 2 Year

Mladen Buntich

Mladen Buntich Const. Co., INC
18831 Rockinghorse Lane
Huntington Beach, CA 92648
818-370-2583 Cell
Mbjr@buntich.com
Affiliation: CEO
Term: 4 Years

MERCY HOUSE

Daryl A. Cole, CFP

Cole & Company Wealth Management,
Inc.
1835 W. Oranewood Ave #102
Orange, CA 92868
714-750-3090 x101 Office
714-743-2220 Cell
darylcole@aol.com
Affiliation: Business Owner
Term: 13 years

Jeremy Elkins

Camino Health Center
30300 Camino Capistrano
San Juan Capistrano, CA 92675
949-240-2030
Jeremy.Elkins@stjoe.org
Affiliation: CEO
Term: 1 year

Phillip R. Kaplan

Umberg Zipser, LLP
1920 Main St #750
Irvine, CA 92614
949-679-0052
Pkaplan@umbergzipser.com
Affiliation: Attorney
Term: 9 Years

Marianne R. Koshar

The Boeing Company
2201 Seal Beach Blvd.
MC 110-SB25
Seal Beach, CA 90740-1515
562-225-4780 Cell
marianne.l.koshar@boeing.com
Affiliation: HR Director
Term: 1 Years

Richard Lopez

The Boeing Company
2201 Seal Beach Blvd.
MC 110-SB25
Seal Beach, CA 90740-1515
(714) 262-8811 (Cell)
Richard.Lopez@boeing.com
Affiliation: Attorney
Term: 5 Years

Richard K. Masterson

2 Corona
Irvine, CA 92603
949-679-4122 Home
949-394-9916 Cell
rkmasterson759@gmail.com
Affiliation: Retired Business
Development
Term: 8 Years

Jessica Petrillo

City of Oxnard
435 South D Street
Oxnard CA, 93030
Office Phone: 805 385-8044
Affiliation: Public Sector Homeless
Assistance Program Coordinator
Term: 1 Year

Christie Pettus

Creative Design Consultants, LLC
2915 Redhill Ave. G-201
Costa Mesa, CA 92626
714-641-4868 Office
714-915-5454 Cell
christiep@cdcdesigns.com
Affiliation: Principle/Director
Term: 13 Years

Jim Righeimer

Arbor Capital Partners
4040 MacArthur Blvd, Suite 250
Newport Beach, CA 92660
714-404-7567 (Home)
Jim@RFComsites.com
Affiliation: Real Estate Developer
Term: 3 Year

Michael Solo

Diversified Investment Services
3665 S. Bear St.
Santa Ana, CA 92704
(714) 390-0957 (Cell)
Msolo@disinc.com
Affiliation: CFP
Term: 1 year

Lisa Rumbaugh

Clarity Tax Accounting
17 Serna
Rancho Santa Margarita, CA 92688
949-459-7450 Home
949-280-9401 Cell
lisa.rumbaugh@att.net
Affiliation: Sole Proprietor
Term: 13 Years

To Whom it May Concern:

It has been an honor to work closely with the City of Costa Mesa in various ways over the past 10 years to engage volunteers and help provide supportive services throughout the community to neighbors in need.

This proposal, in response to RFP 23-15.C04715 for “Housing Related Supportive Services For Qualifying Populations” is addressing people experiencing homelessness or home insecurity in the city. This proposal is based on a tried and proven program called the Community Impact Team. If accepted, this proposal will allow us to fill some supportive service gaps that will help this vulnerable population not only re-engage and develop the skills, relationships and habits that will allow them to transition back to work but will address mental health and substance abuse issues in the process. We will also work with the Costa Mesa Bridge Shelter to provide some transportation services to support their work with this population.

As a non-profit organization that was born and has developed here, in Costa Mesa, we are well qualified and have extensive experience in working with this population. Over the past 10 years we have helped 600 + make progress in their life situations. As an organization we are fiscally sustainable based on the variety of churches, businesses, individuals, and grants that help support our work. The Key personnel that will be implementing and executing what we are proposing have a proven track record / reputation in the city and with this population. We already have a working relationship with the city leaders engaged in the homeless arena and would anticipate a seamless ongoing relationship, reporting and updating on progress being made.

The “Community Impact Team Program” costs roughly \$355,000 a year for us to run. It is supported by various public and private means. For budget year 23-24, we are requesting \$27,000 to help cover transportation for Community Impact Team members from the shelter to weekly team meetings as well as to a weekly recovery meeting and life skills meeting for the year as well as Costa Mesa specific costs to sponsor 3 projects a week being done in and for Costa Mesa for the months of May & June of 2024. For the 24-25 budget year we are requesting \$87,550 and for the 25-26 budget year we are requesting \$90,000, the slight bumps are for CPI.

When people experiencing homelessness or facing home insecurity don’t have an accessible, feasible pathway to move forward, that is connected to a relational community of people that can help them take next steps, they lose hope and stay stuck. The Community Impact Team has seen proven results. As participants have engaged with the program, self-esteem, hope and relationships have improved, depression, lack of purpose and isolation have declined. The ongoing connections with our staff and volunteers builds trust, confidence and give participants the support they need to take their next steps.

We sincerely thank you for your consideration.

Ian Stevenson
Executive Director
Cell: 949-422-5331

Trellis
711 W 17th St. Ste E5, Costa Mesa CA | 92627
www.wearetrellis.com
Follow us: [Facebook](#) | [Instagram](#)



Request for Proposal For Housing Related Supportive Services For Qualifying Populations

Background and Project Summary

Trellis is a grassroots organization that emerged in Costa Mesa, became a 501 C3 in 2013 and focuses on facilitating collaboration around the city's greater challenges. In this vein, we were part of the city's original task force on homelessness in 2011. Responding to the 9 recommendations coming out of that task force, since 2012 we have served by taking on the responsibility of facilitating a Check-In Center, that is run primarily by volunteers from over 14 churches, and various businesses and community members. We have been an ongoing part of the Network for Homeless Solutions since its inception, have helped in street outreach, the various counts that have been done over the years, have mobilized hundreds of volunteers from multiple churches, businesses, and community groups in the Costa Mesa. In 2014, because of the gap that was evident in terms of ways to help people help themselves, raise their self-esteem and establish work habits, we pulled together a team of volunteers and began to run a program called the Community Impact Team.

During all of this and being engaged with the Costa Mesa Network for Homeless Solutions these past 8 years, we understand the nuances, know many of the individuals and have a very strong working knowledge of the homeless challenge. As we continue to engage and be involved with the homeless population, it's evident that there is a gap in "transitional work" opportunities and processes to help people on the street get back into the flow of contributing to society and discovering or rediscovering their self-worth and the life skills needed to do so.

The Community Impact Team program has a proven track record and is an innovative approach to street outreach. With increased capacity, we can expand the outreach component and engage segments of the city's homeless population that are typically unresponsive to conventional and traditional outreach efforts and systems of care. We have also discovered there are many people in housing that are on the brink of losing their housing who could benefit from a program like this which would help with homeless prevention. This program not only develops community and a common purpose among the participants but allows us to engage more of the community in being part of the solution by providing projects or opportunities for the team to accomplish.

The clear objectives of this program are to:

1. Engage people defined as "Costa Mesa Homeless" into a program and pathway that can help them re-enter the work force.
2. Provide an avenue for people at risk of becoming homeless to re-engage with work opportunities and maintain their housing scenarios.
3. Increase the self-worth and self-esteem of participants.
4. Involve volunteers, businesses, faith-based organizations and non-profits to provide projects and be part of the solution.
5. Establish a sustainable transitional work program than can serve our community on an ongoing basis.
6. Provide supportive services aimed at removing barriers to employment and housing for individuals experiencing homelessness.

Method of Approach

I. Implementation Plan

1. Weekly - Community Impact Team Meeting
 - We market and promote this meeting through relationships with churches, businesses and community members connected to Love Costa Mesa and the Network for Homeless Solutions.
 - Previous beneficiaries of the program are invited to be part of giving back.
 - Program is outlined and volunteer opportunities are clearly presented.
 - Participants willing to start the program by volunteering are identified.
2. Projects that the Community Impact Team will carry out are established with various faith-based organizations, businesses and the city.
 - Contracts will be established in some cases.
 - MOU Agreements / Financial commitment in others.
3. Outreach to prospective participants in the program will be executed.
 - Including, but not limited to:
 - Clients at the Costa Mesa Bridge Shelter
 - Recommendations from the Network for Homeless Solutions Team and any other street outreach service providers working in Costa Mesa.
 - Housed individuals who could benefit from the program to help maintain their housing are targeted.
4. Weekly Meetings, run by the Program Director and supported by a team of volunteers keeps the momentum rolling, encourages participants and facilitates empowering relationships. At each meeting:
 - Attendance is taken.
 - We'll Inspire, Encourage & Empower attendees to take next steps & to make a difference.
 - There will be training components put in place for life skills and work ethic values.
 - Participants are presented volunteer projects for the next week.
 - A Team of volunteer mentors/advocates are connected to program participants.
 - Participants are linked to vocational training opportunities & organizations for job placement.
5. The flow for engagement and movement through the program is as follows:
 - A. Engage the masses with Saturday Meetings.
 - B. Attend 2 meetings before they can volunteer for a project to show they are able to follow through.
 - C. After 2 meetings they could do a project as a volunteer and are awarded a basic need stipend in appreciation for their engagement.
 - D. When they have participated in 4 projects, they are interviewed by CIT leadership for next steps and opportunities for work.
 - What if they are not ready to be hired?
 - Put them on an improvement program
 - Next steps would involve training opportunities.
 - If they become an employee, they can still come to meetings on Saturday and help develop the program:
 - Recruit & bring "volunteers" to meetings with them to become part of the program.
 - Help/have a role at the meeting and represent the team well.

- E. As a part of the program we will be striving to link them to better job opportunities.
 - a. Through Chrysalis
 - b. Through partner businesses, churches, organizations, cities we work with.
- 6. Teams will be established that would be able to do:
 - Power washing - Basic Painting Projects - Moving
 - Office cleaning - Yard work - Window washing
 - Handing out flyers - Shuttle Driving for Shelter - Trash Pick up
- 7. We will measure: (breaking out the Costa Mesa residents in the process)
 - How many individuals participate in the program?
 - How many individuals have engaged with projects?
 - How many were transitioned to regular jobs/
 - How many got into housing over time?
 - How many were able to keep their housing as a result of being part of the program?
 - The practical impact of the projects, such as:
 - How much trash was picked up?
 - How many parks were cleaned?
 - How many sidewalks or alleys were power washed or cleaned up?
 - How many volunteers are engaged with the program?

II. Achieving client satisfaction and satisfying the “Scope of Work”

As an organization, the following course of action will be taken in order to ensure the City of Costa Mesa, as the client, is satisfied with our performance and understands how we are doing regarding the scope of work outlined in this proposal:

A monthly update:

- Reporting on the above mentioned measurables
- Giving budget updates
- Sharing success stories
- Being transparent about challenges

A monthly check in (meeting or zoom) with the appropriate personnel the client has designated, to:

- Discuss progress, answer questions, brainstorm and share next steps specifically around this program.
- Give us the names and referrals of prospective participants in the program from city staff.

A quarterly report outlining:

- Names and numbers of people who have been engaged at what levels
- Cumulative numbers on all the measurables outlined above

An annual review:

- Walking through the scope of work together and evaluating performance
- Determining how we want to continue partnering on this project or not
- Evaluating budget from prior year and what’s projected for the next year

| III. Deliverables to be performed | Duration of Time | Completion Date |
|--|-------------------------|----------------------------|
| 1. Recruit 10-20 volunteers per year | Year of program | June, 2024 |
| 2. Secure ongoing projects for program | Ongoing process | June, 2024 |
| 3. Effective, engaging weekly meetings | Ongoing process | June, 2024 |
| Curriculum for meetings | Throughout program | June, 2024 |
| 4. 30 participants engaged with homeless system of care. | Within year of program | June, 2024 |
| 5. Tracking housing support deliveries | Sept. onward | June 2024 |
| 6. Monthly updates & check ins | July 2023 – June 2024 | June 2024 |
| 7. Quarterly Reports | Throughout program | Oct.1, Jan1, Apr.1, July 1 |
| 8. Annual Review | End of each year | June, 24 |

IV. Expand Employment and Housing Support Services:

- Expand # of projects for CIT members to engage with in Costa Mesa and provide some part-time employment options for team members to help develop the program.
 - Costa Mesa Beautification Project Opportunities - 3 Per Week – 4 Member Teams w/ a supervisor (192 Team Member Project Slots)
 - Street Projects –
 - Newport Blvd from Bristol Street to 16th Street
 - Harbor Blvd. from Gisler Avenue to Merrimac Way
 - Fairview Road from the 405 Freeway overpass to Newport Blvd
 - Adams Avenue from the Santa Ana River to Harbor Blvd
 - Park Projects –
 - Del Mesa Park
 - Tewinkle Park
 - Wakeham Park
 - Skill Building/ Job Search
 - Twice per month CIT will provide training alongside local organizations to help with job searches, interview prep, resume building, assistance with documents needed for work, & assistance with clothing for back to work requirements
 - Part time opportunities
 - As funding, opportunity and the rite fit for a team member becomes evident, team members can become part time employees on the CIT to help run the program.
- Expand support in housing
 - Navigation
 - Helping CIT members locate available housing
 - Security/ Utility Deposits
 - Helping CIT members with deposits for apartment rental/ utilities
 - Helping CIT members with Lease Assistance
 - Housing Documentation
 - Helping to ensure CIT members have proper housing documents
 - Proof of income, credit history, rental history

- Housing supplies
 - Furniture acquisition (donations) and delivery to people housed
 - Welcome home boxes (kitchen, bedroom, cleaning)

V. Additional innovative and/or creative approaches for providing services

Provide supportive services aimed at removing barriers to employment and housing for individuals experiencing homelessness. As part of this program there is all kinds of room for increased innovation and creativity as the right individuals, volunteers, leaders and opportunities present themselves. Here are examples of things we envision:

- Engaging members of our target audience with artistic abilities:
 - Painting murals
 - Developing art skills and having art shows
 - Establishing a choir and doing performances
- Collaborate with Non-profits already in place for vocational training & job placement
- Engage business leaders through the Chamber of Commerce to offer apprentice type scenarios for participants

Qualifications & Experience of the Firm:

Trellis International will be responsible for performing the services outlined in this proposal.

General Information:

- Trellis is a 501 C3 non-profit, incorporated in the state of California.
- We have been operating as Trellis International since our incorporation in 2013 but generally don't include the "International" in our name since we are not there yet.
- Corporate & Local Address since January 2016: 711 W. 17th Street, Unit E-5
Costa Mesa, CA 92627
- Our Board Officers are:
 - Chairman: Mark VanDruff
 - Secretary: Helen Kaminski
 - Treasurer: Rachel Maxfield
 - Executive Director: Ian Stevenson
- Our EIN is 47-5324236
- Trellis also has a DBA as "Love Costa Mesa"

Previous Experience:

- 2022 (Sept.–Dec.) ARPA resources from the county were awarded to Trellis through the city.
 - CIT teams did 3 projects a week cleaning streets and parks throughout the city.
 - Team members continue to increase in personal and civic pride and take steps forward and off the streets.
 - Overall numbers for 2022 are:
- July 2021 – June 2022 Trellis leveraged CDBG-cv grant resources to help develop and strengthen this program. Reports and results have been exemplary. YTD numbers are:
 - 208 Participants - 181 homeless, 27 with housing insecurity
 - 110 Unique individuals engaged in a program
 - 19 Regular volunteers helping facilitate the program
 - 9 Businesses engaged
 - 10 Churches engaged
 - 7 Non-profits engaged

- 2017-18 Fiscal Year - Trellis was awarded a CDBG contract with the city of Costa Mesa for homeless outreach work.
 - The tracking and results were above and beyond expectation.
- From 2014 to just before COVID shut everything down, Trellis facilitated the Community Impact Team with minimal part time attention and a team of volunteers. Our records indicate:
 - 326 Individuals attended a meeting at least once
 - 57 stayed engaged enough to get on a team
 - 31 of that 57 ended up getting into housing of some sort
 - 20 of them landed a job/steady work of some sort
 - 19 of them went through a culinary arts program with Open Gates
 - We had steady project agreements established with:
 - Mariners Church
 - Newport Rib Company
 - Cal Bath Restoration
 - Plant Tenders
 - We did numerous other projects with:
 - Various individuals / homeowners
 - The Crossing Church
 - Rock Harbor Church
 - Lighthouse Community Church

Community Engagement

- Trellis has been a member of the Costa Mesa Chamber of Commerce for 4 years
- As part of our ongoing efforts to facilitate collaboration in Costa Mesa we are also involved in leading:
 - The Costa Mesa Cares Team that has been responding to COVID needs in the city.
 - Organized and engaged over 300 volunteers with the Power of One food distributions for 10 straight weeks at the Fairgrounds to serve 30,000 families.
 - Donated \$3,000 to the enough for all fund
 - Served over 200 families needing assistance during COVID
 - Love Costa Mesa Day for the past 3 years involving over 2,000 volunteers in 103 different projects impacting thousands of people.
 - Labors of Love – monthly volunteer serving projects to help neighbors in need throughout the community.
 - Intentional Neighboring throughout the city with over 150 Intentional Neighbors registered.
 - An Education Initiative for the past 8 years that has mobilized hundreds of volunteers to impact our schools.
 - Prayer efforts in our city that have united hundreds of people over the past 8 years from multiple congregations in their prayer efforts for our city.

Financial Capacity

Trellis is a grass roots organization that has developed and emerged slowly within the Costa Mesa Community over the last 10 years. In that process we have grown each year, have established strong accounting practices and have managed our budget well.

We have a strong base of support as a non-profit with four main streams of revenue:

Individuals who support us (last year we had 361 donors)

Faith Based organizations (last year we had 31)

Business sponsorships (last year we had 45 that donated)

Grants from both public and private sources

We also have a very capable and competent operations team that will help support our efforts with the Community Impact Team and the staff overseeing the program.

The program (The Community Impact Team) itself costs roughly \$300,000 a year to run. Our overall budget this year is roughly \$1,000,000.00. The degree of support we receive will directly affect how many services and opportunities we can provide to the population in need.

Key Personnel

Executive Director - Ian Stevenson

Phone: (949) 422-5331

Email: ian@wearetrellis.com

Ian Stevenson became the full time Executive Director of Trellis in fall of 2015. He is the primary vision caster, developer of strategy and person responsible for expanding our capacity in the organization. A team guy at heart he loves seeing teams develop, grow and become more effective, as a result the work he does with our board, staff and leaders is a joy to him and an outflow of who he is.

Prior to joining Trellis full time, Ian was the Executive Director as a volunteer and a Pastor at The Crossing Church in Costa Mesa, California. He was the church's second full-time staff member in 1989, and over the next 27 years focused on ministry development, outreach and teaching. He heled lead, manage and grow the church from 40 to approximately 2,000. Ian is an expert in volunteer mobilization and management and has an extensive background in strategic planning, budget preparation, goal setting, and facilitating partnerships. He holds a bachelor's degree from Jacksonville University.

He will be ultimately responsible for the running of this program. Ian started the program from scratch in 2014 with a team of 7 volunteers. Although day to day responsibilities have been delegated, he will be staying engaged to help make the needed adjustments to the program and connections needed to help ensure it is successful and that we perform on our deliverables.

Program Director – Crystal Clark, Homeless Initiative Director for Trellis

Phone: 949) 601-2757

Email: Crystal@wearetrellis.com

Crystal Clark was born and raised in Costa Mesa. She began volunteering doing street outreach with our homeless population in 2012 and has been involved in some manner ever since. She was contracted to work for the city doing street outreach through Trellis for 3 years, has been on staff at SOS for 3 years and now, as of January 2023, leading the Homeless Initiative for Trellis. Her focus is helping volunteers, churches, businesses and other non-profits collaborate around the challenges related to homelessness. One of the key ways we do that is through the Community Impact Team.

Crystal personally knows the players in the homeless space not only in the city but throughout the county. She is known for helping the toughest cases get the help they need. Her oversight of the Community Impact team brings with it practical support as well as wisdom gained through her experience.

Project Manager – Terry Moore

Phone: (949) 230-9946

Email: Terry@wearetrellis.com

Terry has lived in the area for over 40 years. He has volunteered in the homeless arena for the past 13 in various ways and places. Terry is extremely connected in the Costa Mesa & Newport Beach communities from his volunteer work, professional experience and church engagement. Terry not only brings a big heart for people struggling to the table but a professionalism to the program. His numerous connections throughout the community help us secure projects for Community Impact Team members to participate in. Terry also helps recruit, train and empower volunteers that come into the program.

Program Administrator – Ray Nulod

Phone: (949) 310-0948

Email: ray@wearetrellis.com

Ray is a veteran who faithfully served our country. He has an extensive background in hospital administration, is great with people and is a gifted problem solver and peace maker. As a participant in the Community Impact Team Program, we got to see Ray continue to take steps that moved him from living on the streets to getting into housing. Ray became the second participant in the Community Impact Team that became a Project Manager we hired to help run the program.

Rays' administrative skills, experience as a participant in the program as well as his connection and skill in relating with people experiencing homelessness has proven invaluable as we have been running the program. No doubt Rays' insights and support both administratively and in managing teams as projects are accomplished will continue to help make this program successful.

Cost Proposal

It costs roughly \$355,000 to run this program for the year. Because of a collection of support from the public and private sectors our request here is to fill the gap so we can best serve Costa Mesas' homeless population.

Having recently been awarded a Community Development Block Grant for this program for \$70,000 that will run May 1, 2023 – April 30, 2024 and in order for the program to best serve Costa Mesa individuals experiencing homelessness for the next 3 years, we are proposing:

A. Budget year 23-24 - \$29,640 be awarded. This will cover:

1. Transportation costs of to and from Costa Mesa Bridge Shelter for CIT members to:

- weekly team meetings
- weekly Life skills meetings
- weekly recovery meeting

(\$15,000 for July 2023 – July 2024)

2. Costa Mesa CIT projects being completed 3 X a week May 1, 2024 – June 30, 2024
(\$12,200)

3. Housing Support – Helping 2 homeless people per month for the fiscal year get furniture and supplies moved in to their new housing situation. (\$2,440)

B. Budget year 24-25 – \$87,952 to maintain the program and allow for increased costs of program based on inflation. This accounts for:

1. Transportation costs of to and from Costa Mesa Bridge Shelter for CIT members to:

- weekly team meetings
- weekly Life skills meetings
- weekly recovery meeting

(\$15,000 for July 1, 2024 – June 30, 2025)

2. Costa Mesa CIT projects being completed 3 X a week July 1, 2024 – June 30, 2024
(\$70,512)

3. Housing Support – Helping 2 homeless people per month for the fiscal year get furniture and supplies moved in to their new housing situation. (\$2,440)

C. Budget Year 25-26 - \$90,590

1. Transportation costs of to and from Costa Mesa Bridge Shelter for CIT members to:

- weekly team meetings
- weekly Life skills meetings
- weekly recovery meeting

(\$15,000 for July, 1 2025 – June 30, 2026)

2. Costa Mesa CIT projects being completed 3 X a week May 1, 2024 – June 30, 2024
(\$70,512)

3. Housing Support – Helping 2 homeless people per month for the fiscal year get furniture and supplies moved in to their new housing situation. (\$2,440)

4. Adding 3% CPI (\$2,638)

Disclosures

Trellis has no business relationship with any current Costa Mesa elected or appointed official or city employee.

Subrecipient Agreement

We are prepared to sign the Subrecipient agreement as is.



VENDOR APPLICATION FORM

FOR

RFP NO. 23-15 HOUSING RELATED SUPPORTIVE SERVICES FOR QUALIFYING POPULATIONS

TYPE OF APPLICANT: ☐ NEW ☒ CURRENT VENDOR

Legal Contractual Name of Corporation: Trellis International

Contact Person for Agreement: Crystal Clark

Title: Homeless Initiative Director E-Mail Address: crystal@wearetrellis.com

Business Telephone: 949-873-5805 Business Fax: n/a

Corporate Mailing Address: 711 W 17th St. STE E5

City, State and Zip Code: Costa Mesa, CA 92627

Contact Person for Proposals: Ian Stevenson

Title: Executive Director E-Mail Address: ian@wearetrellis.com

Business Telephone: 949 878 5805 Business Fax: n/a

Is your business: (check one)

☒ NON PROFIT CORPORATION ☐ FOR PROFIT CORPORATION

Is your business: (check one)

☒ CORPORATION ☐ LIMITED LIABILITY PARTNERSHIP

☐ INDIVIDUAL ☐ SOLE PROPRIETORSHIP

☐ PARTNERSHIP ☐ UNINCORPORATED ASSOCIATION

Names & Titles of Corporate Board Members

(Also list Names & Titles of persons with written authorization/resolution to sign contracts)

| Names | Title | Phone |
|-------------------------|-------------------------------|---------------------|
| <u>Mark Vandruff</u> | <u>Chairman</u> | <u>949-356-6384</u> |
| <u>Helen Kaminski</u> | <u>Secretary</u> | <u>773-505-7139</u> |
| <u>Rachel Maxfield</u> | <u>Treasurer</u> | <u>760-628-8635</u> |
| <u>Isabel Carpenter</u> | <u>Director of Operations</u> | <u>909-838-4768</u> |
| <u>Ian Stevenson</u> | <u>Executive Director</u> | <u>949-422-5331</u> |

Federal Tax Identification Number: 

City of Costa Mesa Business License Number: 49119

(If none, you must obtain a Costa Mesa Business License upon award of contract.)

City of Costa Mesa Business License Expiration Date: 9/30/23

EX PARTE COMMUNICATIONS CERTIFICATION

Please indicate by signing below one of the following two statements. **Only sign one statement.**

I certify that Proposer and Proposer's representatives have not had any communication with a City Councilmember concerning informal **RFP No. 23-15 HOUSING REALTED SUPPORTIVE SERVICES FOR QUALIFYING POPULATIONS** at any time after **March 27, 2023**.



Signature

Date: 4/10/23

Ian Stevenson

Print

OR

I certify that Proposer or Proposer's representatives have communicated after **March 27, 2023** with a City Councilmember concerning informal **RFP No. 23-15 HOUSING RELATED SUPPORTIVE SERVICES FOR QUALIFYING POPULATIONS**. A copy of all such communications is attached to this form for public distribution.

Signature

Date: _____

Print

DISQUALIFICATION QUESTIONNAIRE

The Contractor shall complete the following questionnaire:

Has the Contractor, any officer of the Contractor, or any employee of the Contractor who has proprietary interest in the Contractor, ever been disqualified, removed, or otherwise prevented from bidding on, or completing a federal, state, or local government project because of a violation of law or safety regulation?

Yes _____ No X

If the answer is yes, explain the circumstances in the following space.

DISCLOSURE OF GOVERNMENT POSITIONS

Each Proposer shall disclose below whether any owner or employee of Contractor currently hold positions as elected or appointed officials, directors, officers, or employees of a governmental entity or held such positions in the past twelve months. List below or state "None."

None

COMPANY PROFILE & REFERENCES

Company Legal Name:

Company Legal Status (corporation, partnership, sole proprietor etc.): Corporation

Active licenses issued by the California State Contractor's License Board: N/A

Business Address: 711 W 17th St STE E5, CM CA 92627

Website Address: WWW. wearetrellis.com, lovecostamesa.org

Telephone Number: 949-873-5805 Facsimile Number:

Email Address: info@wearetrellis.com

Length of time the firm has been in business: 10 years

Length of time at current location: 10 years

Is your firm a sole proprietorship doing business under a different name: ☐ Yes ☒ No

If yes, please indicate sole proprietor's name and the name you are doing business under:

Federal Taxpayer ID Number: [REDACTED]

Regular Business Hours: M-F 9-5

Regular holidays and hours when business is closed: Good Friday, Thanksgiving, Christmas week, New Years Day

Contact person in reference to this solicitation: Ian Stevenson

Telephone Number: 949-422-5331 Facsimile Number:

Email Address: ian@wearetrellis.com

Contact person for accounts payable: Isabel Carpenter

Telephone Number: 909-838-4766 Facsimile Number:

Email Address: isabel@wearetrellis.com

Name of Project Manager: Crystal Clark

Telephone Number: 949-601-2757 Facsimile Number:

Email Address: crystal@wearetrellis.com

COMPANY PROFILE & REFERENCES (Continued)

Submit the company names, addresses, telephone numbers, email, contact names, and brief contract descriptions of at least three clients, preferably other municipalities for whom comparable projects have been completed or submit letters from your references which include the requested information.

Company Name: City of Newport Beach

Contact Name: Theresa Schweitzer

Contract Amount: \$30,000

Email: tschweitzer@newportbeachca.gov

Address: 100 Civic Center Dr., Newport Beach CA 92660

Brief Contract Description: provided volunteer teams of people experiencing homelessness to assist with park & beach maintenance

Company Name: Doing Good Works

Telephone Number: Scott Henderson

Contact Name: 949-278-6387

Contract Amount: \$65,000

Email: scotth@doinggoodworks.com

Address: 9272 Jeronimo Rd Ste 106 Irvine, CA 92618

Brief Contract Description: Provided teams of volunteers of people experiencing homelessness to assist with warehouse packing projects

Company Name: City of Costa Mesa

Telephone Number: 714-754-5274

Contact Name: Nate Robbins

Contract Amount: \$10,000

Email: nate.robbins@costamesaca.gov

Address: 77 Fair Drive Costa Mesa CA 92626

Brief Contract Description: provided volunteer teams of people experiencing homelessness to assist with park maintenance projects

Company Name:

Telephone Number:

Contact Name:

Contract Amount:

Email:

Address:

Brief Contract Description:

Company Name:

Telephone Number:

Contact Name:

Contract Amount:

Email:

Address:

Brief Contract Description:

Executive Team
February 27, 2023

Executive Team Overview 2023

Clarity

A. Why do we exist? Why should we be here? (just short of to make the world a better place)

- What gets us out of bed in the morning?
- Why is the world better off because of us?
- Keep simple, doesn't need to go on a poster, just needs to live in our gut.

B. How do we behave?

- Not so much a list of value words but what are the 2-3 that we will not be tolerant around?
 - o Be Fit – Take care of ourselves physically, spiritually, relationally

C. What do we do?

- We facilitate collaboration around spiritual, relational and practical challenges in a city.

D. How will we succeed? How will we do it in a way that is unique and makes us successful.

- Build relationships with Catalysts
- Provide resources, tools and support to help them succeed in their city.

E. What's most important right now? (for the next 3-9 months)

- Rallying cry, biggest priority now, (pick the crises)

Numbers for Feb.

- Big Wins

Go over program for 16th

- Review
- Invites
- Prayer

April 15th Imperial Beach - Mapping

April 18th 4:00 - business leaders
Barnabas -

Steve Brester - Cru.

prayerforce.live - 24/7 Prayer
for California

(Chuck Klein) Prayer for schools - every school.com.
Campus Alliance
Prayer Coordinator for Zone -

everystudent.org

555 Victoria Unit A.

Low movement.
Inland Empire
Mission America Coalition



Thu 6/15/2023 10:40 AM

John Eumurian <john@projecthopealliance.org>

Fwd: HOME-ARP funding - Please provide information asap - by Thursday 6/15

To DAILY, MIKELLE

Cc Jennifer Friend; Rachel Cardenas

 This message was sent with High importance.

[Bing Maps](#)

[Action Items](#)

[+ Get more app](#)

Hi Mikelle

After talking with the team, we are confident we can reach 140 youth total in Costa Mesa with the assistance of the HOME ARP funding. At the time of writing the proposal, we were serving just over 100 CM students. So the founding would allow us to serve up to an additional 40 students per year, with a minimum goal of 140. If we need to revise the 120 ("Objectives" on page 2) in the proposal to 140, we can do that and resubmit.

Thanks!

John

John Eumurian

Foundation Relations Manager

Project Hope Alliance

1954 Placentia Avenue

Suite 202

Costa Mesa, California 92627

tel:

714.337.1118

fax: 949.722.7836

ending the cycle of homelessness one child at a time
www.ProjectHopeAlliance.org



**Project Hope Alliance: Application for Housing-Related
Supportive Services for Qualifying Populations**

April 12, 2023

City of Costa Mesa
Development Services Department
77 Fair Drive
Costa Mesa, CA 92626

To whom it may concern:

We are respectfully submitting a grant application for (are we asking for an amount) in support of our On-Site Case Management Program for youth experiencing homelessness in Orange County.

The mission of Project Hope Alliance (PHA) is to end the cycle of homelessness, one child at a time. Lack of security and support negatively affect a child's performance in school, their health, their self-confidence, and their emotional and behavioral health and well-being – putting children experiencing homelessness today at huge risk of becoming homeless for life. Our interventions disrupt this progression by addressing the root causes of homelessness through a customized, wraparound support program that works to break down each participant's unique barriers to success.

Thank you for the opportunity to submit this application. Please feel free to contact us if you have any questions or would like clarification. We are grateful for the work the City of Costa Mesa is doing to bridge the gaps in economic prosperity in our community, especially for the most marginalized among us.

For the Kids,

John Eumurian
Foundation Relations Manager
Email: john@projecthopealliance.org
Cell: (714) 337-1118

**Project Hope Alliance (PHA) is a public charity recognized as tax-exempt by the
IRS under Section 501(c)(3). ID#75-3099628*

1. Background and Project Summary

Describe your understanding of the City, work to be done, and the objectives to be accomplished.

The City:

87% of Costa Mesa students and their families are non-White, 77% are Hispanic, 44% are from low-income families, and 29% are living in poverty (compared to 9.9% across Orange County). 91% of those living in poverty are non-white, showing the disparity in income between white and non-white populations in the City. Project Hope Alliance (PHA) is already serving all 12 Title 1 schools in the Newport-Mesa Unified School District, which are all located in Costa Mesa. While these are clearly the school populations with the highest range of needs, Title 1 schools typically garner the majority of resources (i.e. federal aid). This leaves low-income students at non-Title 1 schools bereft of government aid, making PHA's role equally crucial for students at those campuses. Project Hope Alliance serves students who qualify as homeless, under the McKinney-Vento Act of 1987, which includes those living not only on the streets, but in shelters, motels, cars, doubled-up and in places unsafe for human habitation.

"Giving homeless children the chance to be educated, giving them this ticket to their futures is so wonderful. They will have the chance to not repeat the suffering of their childhoods in their own families. They can build secure and safe lives for themselves and their children."

First Lady Laura Bush

Work to be Done:

As an organization, PHA serves McKinney-Vento eligible students and their families, which now total 25,800 students across Orange County. We emphasize the eligibility of all qualified students, as opposed to those officially registered, because students don't always volunteer this information to their school or district, due to the stigmas associated with homelessness. Inevitably, once we arrive on campus, the number of eligible students is larger than those registered. We are currently serving over 100 Costa Mesa students daily on site at Costa Mesa schools, as well as after hours, through the case manager, who is on call for these children 24/7. Since a child's needs do not cease during weekends, holidays, or winter and summer break, we continue our work with the students year-round.

Objectives:

- Project Hope Alliance will serve 120 Costa Mesa students through our On-Site Case Management program, including academic, basic needs and life skills assistance.
- PHA will work to ensure that at least 80% of our Costa Mesa students graduate from high school in the 2023-24 school year.
- PHA will provide group work sessions for high school students in Costa Mesa at each high school. We estimate there will be 15 students at Costa Mesa High School and 15 at Estancia High School.

2. Method of Approach

Detailed description of the approach and methodology to be used to fulfill the Scope of Services

Methods, including controls for managing projects:

Case managers must log all interactions, case notes, assistance, resource referrals, event attendance and assessments on Salesforce. Case notes must be submitted within 24 hours and there must be two case notes at minimum per youth each month. If there is a crisis with a youth then the case note must be submitted the day of the event. The Chief Program Officer receives email notifications for all case notes which are reviewed monthly to ensure that they are compliant with the proper format and that case managers provide adequate support within the scope of practice and in a timely fashion. The Program Manager performs monthly audits to ensure that all assistance has been inputted at the end of each month. Case managers complete monthly check-in forms that include all clients on their caseload with dates reflecting their interactions each month. The Program Manager then reviews all check-in forms to verify that all client interactions were logged in Salesforce. If case managers do not have communication with a client for more than 30 days or there is non-compliance from the client then the Program Manager meets with the case manager to provide support. District Lead Managers visit school sites in their zone on a bi-monthly basis to ensure that all sites are equipped with supplies and meet all organizational guidelines of trauma-informed care. Individual client crises are addressed by the case managers and directed to proper assistance if it is outside of the scope of practice of case managers. Case managers assist clients by calling the Centralized Assessment Team (Orange County Health Care Agency) if it is a behavioral health crisis. Case managers also create safety plans with their clients to reduce risk of future harm and risky behaviors.

Methodology for soliciting and documenting views of internal and external stakeholders:

Starting in the summer, PHA will have its first youth advisory council which will be composed of youth enrolled in our program. These youth are high school age through 24 years old and they will be meeting with the Chief Program Officer and Director Assistant Professor & Equity Advisor at UCI to provide feedback and changes to service delivery. On a quarterly basis, the case managers, district lead managers, and Chief Program Officer meet with the administrators from each school site to provide data regarding services provided, common trends in barriers that youth are experiencing and feedback for improving current processes or protocols.

Project Management/Implementation Strategies – techniques that the respondent intends to employ in carrying out the work:

PHA deploys a long-term, onsite intervention model for youth in three Orange County school districts (total of 11 cities and 47 campuses) who are experiencing homelessness. PHA utilizes a unique program methodology in our middle school and high school programs – placing case managers directly on school campuses where the children attend each day. This place-based strategy fosters meaningful interactions between our students and case managers consistently throughout the school day. These youth too often face obstacles that prevent them from accessing resources and achieving educational and life goals. Program participants are provided customized, wraparound support through one-on-one relationships with trained case managers until the age of 24. These full-time case managers occupy permanent offices on middle school and high school campuses. They regularly interact with district and school administrators, school counselors and faculty to identify students experiencing homelessness and provide them the support they need.

As mentioned, the Orange County students we serve (from Kindergarten to age 24) experience homelessness as defined by the 1987 McKinney-Vento Act. They live in shelters, cars, motels, or doubled/tripled-up with other families. While most homeless-serving organizations use the HUD definition (including only homeless people in shelters or on the streets), PHA ensures that all students who experience homelessness and face associated barriers receive the holistic support they need to be successful in and out of school. Students are identified by the schools we serve, as well as through student-to-student referrals.

Detailed description of efforts your firm will undertake to achieve client satisfaction and satisfy the requirements of the Scope of Work:

The long-term goal for every student in PHA's program is high school graduation, followed by post-secondary school or employment. PHA programs intentionally parallel a child's entire academic continuum, from kindergarten to post-college. During the school year, PHA has a daily on-site presence at school campuses. Each case manager has been provided an office space by the school, completely equipped with a desk, furniture, phone and internet access. As teachers or school staff encounter a child with identified needs, they refer them to our office location where the case manager can talk to them and identify their level of need, and if qualified, can sign them up for our program. Each office is also equipped with a food pantry, wardrobe closet, educational supplies and hygiene kits, to help address some of the basic needs the students disclose.

During the summer, the case managers' role transitions to providing services remotely, meeting students where they are living, at our offices, or at locations convenient to the youth. In the lives of our youth, complicated by transitory adults and systems, the goal is to introduce as little disruption as possible, while providing a consistent and stabilizing influence in their lives. Key milestones coincide with the end of each school year, middle school and high school graduation, and college entrance and graduation.

In order to achieve long-term successful outcomes, our case managers address 10 distinct areas that are key to a child's development, including: social and emotional wellness; education; parental and family support; housing; financial stability; basic needs; health and safety; building relationships with stable and trusted adults; life experiences and passions; and providing future vision and direction. In order to address the short-term goals in each of these areas, we utilize a variety of assessment tools including our proprietary Hope Index, Developmental Asset Profile, and Needs Assessment. All of these tools are used to inform and update case plans which provide step-by-step guidance toward achieving the youth's individual academic and life goals.

We deploy a variety of services that can be tracked as milestones in our program. The completion of these milestones forms the foundation of success for each child as they reach adulthood. Some of our basic program milestones include:

- Qualification
- Intake/program entry
- Assessment(s)
- Creation of a goal plan
- Wraparound service support (academic, and basic needs on an ongoing basis)
- Daily, weekly, monthly check-ins

- Liaising between students and their parents, teachers, counselors, administrators and McKinney-Vento representatives (ongoing)
- Referrals to community resources (ongoing)
- Graduation from high school
- Assistance with college and FAFSA applications
- Graduation from college
- Job search assistance and job coaching
- Program graduation

"People are not rallied to solve a problem that they don't know exists"
 Quote by Jennifer Friend, Project Hope Alliance
 CEO, on the issue of homelessness among
 America's public-school students

In the past year, we have seen significant successes by students in our programs, including:

- A 96% on-time graduation rate and 100% overall graduation rate, compared to the state average of 69.7% (for youth experiencing homelessness)
- 76% of high school seniors enrolled in college, compared to the state average of 41% for all high school graduates
- 74% of out-of-school students are working full-time or part-time
- Reduced rates of absenteeism, tardies and behavioral issues

Detailed project schedule

| | |
|--------------------|---|
| Organization Name: | Project Hope Alliance |
| Project Name: | On-Site Case Management For Youth Experiencing Homelessness |
| Start Date: | 7/1/23 |
| End Date: | 6/30/24 |
| Project Goal: | Ending the Cycle of Homelessness for Youth in Orange County, CA |

| Activity | Deliverable | Month | | | | | | | | | | | |
|--|--|----------|-----------|----------|----------|-----|----------|----------|----------|----------|-----------|------------|------------|
| | | Aug 1 | Sept 2 | Oct 3 | Nov 4 | Dec | Jan 6 | Feb 7 | Mar 8 | Apr 9 | May 10 | June 11 | July 12 |
| Project Backpack | Deliver backpacks and school supplies to each student in the program. | X | | | | | | | | | | | |
| School Starts and first Case Management Session - generally late August to early September | Each student has an initial case management meeting at the start of the year | X | | | | | | | | | | | |
| August Group Work Session #1 | Healthy Relationships and Boundaries | X | | | | | | | | | | | |
| August Enrichment Activity | Planned activity to build socialization skills and community. | X | | | | | | | | | | | |
| August Parent Workshop | Topical Training for student's parents | X | | | | | | | | | | | |
| August Tutoring & Mentoring | Academic and Social-Emotional Coaching | | X | | | | | | | | | | |
| September Case Management Sessions (2) | Notes recorded in Salesforce | | X | | | | | | | | | | |
| September Group Work Session #2 | Online Safety (High School only) | | X | | | | | | | | | | |
| September Enrichment Activity | Planned activity to build socialization skills and community. | | X | | | | | | | | | | |
| September Parent Workshop | Topical Training for student's parents | | X | | | | | | | | | | |
| September Tutoring & Mentoring | Academic and Social-Emotional Coaching | | X | | | | | | | | | | |

| | | |
|--|---|---|
| May Tutoring & Mentoring | Academic and Social-Emotional Coaching | X |
| June Case Management Sessions (2) | Notes recorded in Salesforce | X |
| June Tutoring & Mentoring | Academic and Social-Emotional Coaching | X |
| High School Graduation | Tracking in Salesforce | |
| | Outcomes recorded in Salesforce (Quarterly) | X |
| Hope Index and Needs Assessment | | |
| July/August Case Management Sessions (2 per month) | Notes recorded in Salesforce | X |
| July/August Tutoring & Mentoring (1 per month) | Academic and Social-Emotional Coaching | X |
| Summer Enrichment Activities (2022 activities listed below by way of example) | | X |
| Beach day for Scholarship Prep Academy | | |
| Movie Day for 7-12 | | |
| OCC Tour for high schoolers | | |
| Senior celebration at Knotts Berry Farm | | |
| Discovery Cube for K-6 | | |
| Aquarium Trip for 5-12th | | |
| UCI Tour for high school | | |
| Skate Camp in San Clemente for middle school | | |
| Angel's Game for K-12 | | |
| Hike Day in Laguna Beach for high school | | |
| Movie Day for K-6 | | |
| Parent Workshop on Positive Communication with Children | | |
| Beach day for high school | | |
| Discovery Cube 7-12th | | |
| Cultural Museum in Long Beach for high school | | |
| Painting event for K-6 | | |
| Career Day for high school | | |
| Art activity for 7-12 | | |
| Movie Social in 108 for K-6 | | |
| CSUF Tour for high school | | |
| CSUDH Tour for high school | | |
| Bi-weekly book club for K-6 | | |
| | During the summer school closure, we plan multiple weekly activities to provide cultural and community experiences, building summer memories before returning to school in the Fall | |

Detailed description of specific tasks you will require from the City staff. Explain what the respective roles of City staff and your staff would be to complete the tasks specified in the Scope of Work:

Our primary program partner would be the Newport-Mesa Unified School District, with whom we have monthly meetings to establish ongoing stable relationships with the teachers, counselors, principals and McKinney-Vento liaisons, as well as to discuss and strategize on individual student cases. Additional quarterly meetings are hosted with district administrators to provide updates on our work and deliver reporting and metrics.

The City, under this Scope of Work, would be responsible for receiving and reviewing our invoices and reporting, notifying the applicant as to changes in policy, as well as processing monthly/quarterly payments, as defined in our agreement. They may also be obligated to fulfill responsibilities under HUD for the oversight of the Program, as defined in the RFP (pg 18).

Additional narrative, including innovative or creative approaches to providing the service that will maximize efficient, safe and cost-effective operations or increase performance:

PHA's unique place-based strategy fosters meaningful interactions between our students and case managers consistently throughout the school day directly on school campuses. Upon enrollment into the program, case managers conduct a needs assessment using PHA's proprietary Hope Index, which covers 10 distinct domains and creates the student's unique "roadmap" for the wraparound services PHA provides. Our students have access to numerous enrichment activities outside the planned curriculum for the students within the program, including activities that their housed peers would have access to, such as summer camps, recreational outings, and visits to college campuses. Our case managers also help the students improve their communication in academic encounters by attending meetings between the

students and teachers, and facilitating collaboration between the teacher and student to define academic goals and a plan. Finally, the case managers are available for the student 24 hours a day – a highly unusual model, which allows our team to be available to address unexpected and emergent needs.

In addition to all of the services listed above, case managers assist senior high youth in completing college applications and applying for specialty educational assistance programs like FAFSA. As mentioned above, onsite pantries, stocked with healthy snacks are available to the students before school, at breaks, lunch and after school. A wardrobe closet is also provided for students who need clothing. Games and activities are hosted at open times in the case manager's office as well, to encourage a fun, relaxing atmosphere.

Our post-high school youth are spread around the county at different 2-and 4-year colleges, as well as trade schools, and workplaces. Our Case Managers travel to locations that are easily accessible to the students, like a coffee house or their college campuses, to ease the burden of transportation. Our goal is to minimize the disruptions in the students' academic path, and facilitate their completion of college, required units, and acquisition of housing and full-time employment – permanently breaking the cycle of homelessness.

Due to the success of this unique model, our students have seen outstanding results (as referenced on page 5). But the benefits of our programs extend far beyond our target population. We have found that society at large reaps economic benefit as well, in the form of cost avoidance and increased tax revenue. How do we know this? In 2020, a team of three researchers from Edwards Lifesciences, based in Irvine, performed an in-depth study of our work and filtered out the following Return-on-Investment reaped by Orange County taxpayers as a result of our work, including these highlights:

- 88% of our students maintained financial and housing stability after participating in our program for two years.
- A PHA graduate saves the County of Orange \$75,000 on an annual basis. This number is comprised of \$45,000 in avoided costs by government and local entities (emergency room, law enforcement, social services, shelters, etc), as well as \$30,000 in increased wages (due to high school graduation and college/trade school completion).
- Over the long term, these cost savings and increases in revenue equate to a projected \$4.4 million by the year 2025 and \$14.3 million by 2030.
- Every \$100 in program spending generates \$264 in value for our community.

3. How many years have you been in business under your present business name?

Project HOPE was formed in 1989 as the result of a schoolteacher's passion for assisting local children experiencing homelessness who attended Project HOPE School in Orange County. In 2007, Project HOPE was changed to Project Hope Alliance, in order to reflect the fact that we had moved beyond one school to serve children throughout Orange County. We have been in the same location for the last 10 years.

4. Provide a list of current and previous contracts similar to the requirements for Costa Mesa, including all public agencies served:

Newport-Mesa Unified School District: Although we have worked with NMUSD in some capacity since 2012, it was in 2016 that NMUSD was confronted with the full gravity of the crisis facing youth experiencing homelessness within its boundaries and made a decision to officially partner with Project Hope Alliance and launch our on-site model of care at Newport Harbor High School. This was our first official Memorandum of Understanding (MOU) with a school district. Since then, we have had an MOU with NMUSD in effect each year. In June 2021, an agreement was signed between PHA and NMUSD which included \$153,128 in grants to help PHA provide schools in the district with on-site case management. An additional agreement for the same amount also went into effect in June 2022. As a result of this increased partnership and funding, our on-site presence in Newport-Mesa has scaled from 13 students at one school to PHA having full-time case managers with their own offices at Newport Harbor High School, Ensign Intermediate School, Estancia High School, Costa Mesa High School, and Costa Mesa Middle School. As part of this agreement, NMUSD provides PHA with office space at each school site, as well as utility connection, WiFi, and access to student records. It also authorizes PHA to serve at any of their 32 school sites. In addition to those campuses where our case managers have their own offices, we are serving NMUSD elementary students at 17 elementary schools including: Adams, Back Bay High School, Cloud Campus, College Park, Corona Del Mar High School, Davis Magnet, Kaiser, La Veta, Mariners, Newport Heights, Paularino, Pomona, Rea, Sonora, TeWinkle, Victoria, Whittier, and Wilson. In total, we are currently serving 122 students throughout Newport-Mesa USD (90% are CM residents). Contact: Sean Boulton, Principal. Newport-Harbor High School, (949) 515-6300

City of Costa Mesa: In July 2021, PHA was awarded a CDBG grant for \$20,000 by the City of Costa Mesa in support of our On-Site Case Management Program for Costa Mesa students. In July 2022 this contract was renewed for \$27,924. In 2023 we again requested additional support for the next grant cycle, and were awarded \$25,000 on April 10th. PHA was also awarded an additional grant of \$162,834 in September 2021 for funding specific to our efforts in providing services throughout the COVID-19 pandemic. An addendum to this grant for an additional \$35,000 was awarded to PHA in 2022. Contact: Mikelle Daily, Grant Administrator, (714) 754-5678

Santa Ana Unified School District: PHA and SAUSD first partnered with one another in 2022, modeling this partnership after our pilot program in NMUSD. The initial MOU placed case managers on-site at Heninger Elementary School. In January 2022, PHA was provided with a \$100,000 contract for services (which expired in June 2022 but was renewed for another year beginning July 2022 for \$250,000) to increase the number of students served at Heninger Elementary and to expand onto additional campuses. Since then, PHA has begun working with students and providing a regular on-campus presence at Edison Elementary School, Mark Twain School, Rosetta Elementary School, Romero-Cruz Academy, and McFadden Institute of Technology. In 2022, we also placed full-time, on-site case managers with their own offices at Santa Ana High School. In total, we are currently serving 80 students throughout Santa Ana USD. Contact: Sonia Llamas, Asst. Superintendent, SAUSD, (714) 558-5805

City of Santa Ana: In December 2020, PHA was awarded a CDBG grant by the City of Santa Ana for \$150,000 to help us provide On-Site Case Management to SAUSD students. In October 2022, we were awarded an additional \$180,000 by the City of Santa Ana, half of which was designated to campuses at which we already had an on-site campus (detailed above) and half

of which was designated to establish a case management office on-site at Carnegie Shelter in Santa Ana to serve the students and families living there. There are currently 13 students who qualify for services at Carnegie shelter. Contact: David Flores, Senior Community Development Analyst, (714) 647-6561

Scholarship Prep Academy: In January 2022, PHA signed a separate contract with Scholarship Prep Academy in Santa Ana, where we have now placed 2 additional full-time case managers. This contract included a grant of \$78,000 (and was renewed in January 2023 for an additional \$90,000). We are currently serving 56 students at Scholarship Prep Academy. Contact: Kristin Crowe, Chief Community Officer, (714) 795-3729 x7025

Huntington Beach Union High School District: A two-year \$150,000 fee-for-services contract established with HBUHSD in December 2022 enabled us to open on-site offices at Huntington Beach High School, Valley Vista High School, and Huntington Beach Adult School, as well as Westminster High School remotely. An additional 2 year contract specifically with Valley Vista High School for \$150,000 was awarded to PHA in May 2022. As this is a new region and district, we have worked for the last year to build relationships with the administrators, principals, and teachers in the district, as well as to inform and bolster their intake process for students experiencing homelessness, build a data-sharing system, unify their schools and boards, and specifically revise the intake and assessment process at Huntington Beach Adult School. We are currently serving 54 students in HBUHSD. Contact: Courtney Spelber, Ed.D, Dir. of Student Services, HBUHSD, (714) 903-7000

City of Huntington Beach: In December 2022, PHA applied for the first time for CDBG funding with the City of Huntington Beach and received an award notification on 2/27/23 for \$20,854. Contact: Greg Hoang, Senior Housing Analyst, (714) 536-5473.

5. Submit a description of the organization's qualifications, experience and abilities that make it uniquely capable to provide the services specified in the Scope of Work.

The combination of Project Hope Alliance's long-standing record of service throughout Orange County, the strong partnerships we have established with community leaders across all sectors, and our exceptionally skilled and experienced staff make us uniquely qualified to provide the services we do to children experiencing homelessness in Orange County.

As referenced above, Project Hope Alliance has been providing invaluable assistance to youth experiencing homelessness in various and ever-expanding ways since 1989. A major turning point came in 2013, as attorney Jennifer Friend accepted the invitation to serve as the CEO of PHA. Jennifer's motto "For the Kids" inspired her leadership, solidified our commitment to always keeping our work child-centric, and ultimately acted as a catalyst for PHA's subsequent remarkable growth. Since that time, PHA has expanded from serving fewer than 65 students at one school to over 350 students at 13 schools throughout Orange County. As we have grown exponentially throughout the years, our longevity and consistent commitment to youth experiencing homelessness have allowed us to keep our finger on the pulse of the most critical needs of this specific population. Our dedication to hiring enough professional case managers to provide individual, intensive case management to each child we serve has also allowed us to take a customized, non-prescriptive approach to eliminating each student's unique barriers to

success. Throughout the decades as our programs have grown and evolved, we have remained true to our belief that the futures of children experiencing homelessness should not be limited by their parents' economic circumstances.

Some specific examples, beyond those described in our Scope of Work, of the unique and specialized assistance we offer that make us particularly capable of providing the services we do, include our Group Work Program and our focus on the mental health of the youth we serve. For the first time this school year, we initiated our Group Work Program curriculum, which consists of nine psycho-educational topics developed based on needs reported by the students we serve. These include: Healthy Relationships and Boundaries, Online Safety, Resume Building, Mock Interviews and Interview Etiquette, Budget and Money Management, Credit and Tax Preparation, Requirements for College and Application Timelines, FAFSA and Scholarships and Student Loans, and Goal Setting. Each month during the school year, each high school campus's case manager teaches one of the nine group topics to their students. Each session consists of two components, education about a topic followed by practical application. Students who participate learn important skills and information as well as put what they learn into practice as a group. Students also get a chance to build community with each other and learn alongside their peers. Thanks to our Chief Program Officer, we have also implemented trauma-informed care principles and strategies to improve the emotional, psychological, social well-being, academic success and overall health of those we serve. Most notable is our innovative and proprietary Hope Index, described in detail above. Case managers complete an assessment every 90 days, and the resulting data is recorded in Salesforce, our enterprise software platform. The Index focuses on a point in time, providing keen insight and guidance into where the student is qualitatively, and changes based upon negative and positive life events. PHA utilizes additional assessment tools including the Developmental Asset Profile and Youth Assessment that is also captured in Salesforce. Program data is reviewed quarterly by the leadership team and annually by the Board of Directors. These reviews result in program refinements and goals for the following year. Objectives related specifically to mental health include ensuring that our students are stably supported by PHA case managers throughout the year (meeting one of the needs in the Hope Index) and improved overall emotional, psychological, and social well-being (as measured by improved results and achievement of life goals).

Over time, through our consistent commitment to those we serve, PHA has established mutually beneficial and supportive partnerships with both the cities and schools/districts in Newport Beach/Costa Mesa, Santa Ana, and now Huntington Beach (explained in detail in the sections regarding these contracts above). This has allowed us unparalleled access to our students through our daily presence on campuses. In addition, PHA has developed deep relationships with faith-based organizations and other agencies serving those experiencing homelessness in Orange County (explained in more detail in section 8 below) to ensure that our students have sufficient basic needs items, access to housing, and enrichment opportunities for success in and out of school.

Lastly, we are immensely fortunate to have an incredibly skilled and dedicated staff and Board of Directors comprised of experts in education, mental health, and childhood homelessness, including Principal Boulton of our inaugural school Newport Harbor HS. By way of example, professionals on our staff who have a deep level of both personal and professional expertise in the areas of homelessness, education, and trauma, include:

CEO, Jennifer Friend: Jennifer grew up experiencing homelessness and went on to become a partner in a law firm before working at PHA. A technology entrepreneur, Jennifer's father experienced unpredictable lapses in income. Although her mother also worked as a preschool teacher, keeping a roof over their family of six proved challenging. While there were periods of financial stability, there were also times of struggle. During Jennifer's junior high and high school years, her three brothers, her parents and she often packed their lives into a 214-square-foot motel room. Jennifer's story represents the 6% (25,400) of Orange County youth who experience homelessness on a daily basis. More importantly, her path to success also provides hope for the kids she now serves as the CEO of Project Hope Alliance. Jennifer graduated from UCI with a degree in Criminology and Law before going on to obtain her Juris Doctor from Whittier Law School in 1998. She practiced law for ten years with Selman, Breitman LLP in Santa Ana, becoming a partner before leaving to helm Project Hope Alliance in 2013. Jennifer's unique experience motivates the rest of our team to serve with compassion and innovation.

Among many other distinguished memberships, Jennifer is a Trustee of the UCI Foundation, and a member of the OneOC Nonprofit Advisory Council and the Susan Samueli Integrative Health Institute Advisory Board. She has also received numerous awards for her work at PHA including the inaugural "Women of Influence" Awards by Coast Magazine, OC's 100 Most Influential Game Changers in the Orange County Register, LA Times' OC Visionary 2022, and Costa Mesa's 2023 Woman of the Year. In February 2022, Jennifer Friend had an opportunity to speak to the crisis on a national level when she was featured in Teen Vogue. In addition, PHA received positive press from the Orange County Register on three occasions in the last 2 years which led to invitations from Santa Ana and Garden Grove School Districts. The collective word of mouth and positive presence in the media has helped pave the way for our rapid growth.

Chief Program Officer, Rachel Cardenas: Rachel holds a doctoral degree in Clinical Psychology and has worked with youth and young adults for the majority of her career. Prior to joining Project Hope Alliance, Rachel worked as a therapist in schools with youth experiencing social, emotional, and behavioral issues and in inpatient and outpatient facilities with individuals experiencing severe mental health concerns. While working in the school system, Rachel also worked as a consultant for teachers and school staff regarding mental health, crisis intervention, behavioral interventions, and social skill development. Rachel specializes in working with individuals who have experienced trauma and has a passion for working with youth. She brings an invaluable clinical lens to her work with Project Hope Alliance. Rachel holds a B.A. in Psychology from Dominican University and a Psy.D. in Clinical Psychology from Argosy University.

Program Manager, Lizbeth Loyola: Lizbeth joined Project Hope Alliance (PHA) in June 2018 as a bilingual Education Coordinator for the organization's Bright Start program, offering academic support and school navigation for families with K-6 students. In her role, she attends parent-teacher conferences and IEP meetings to advocate for students' needs and educational success. She conducts literacy and math assessments to implement academic interventions to bridge the learning gap; provides social and emotional referrals; assists families during crisis situations; and oversees a small client case load as well. Prior to joining PHA, Lizbeth served as an Instructional Provider for Santa Ana and Orange Unified School Districts and a Youth

Development Professional at Boys & Girls Club of Garden Grove. She holds a B.A. in Sociology from California State University, Fullerton, and recently graduated with her M.P.A. from National University.

Guadalupe Contreras, District Lead Case Manager: Guadalupe joined PHA as a case manager in February 2020. Her background includes working with youth and families, including many first-generation high-school students, providing much needed academic and mentor support. Being the first to go to college in her family, she deeply understands how important mentoring programs are to low-income students.

All of our case managers meet PHA's high standards for cultural competency and bilingualism, knowledge of the school system and local resource offices, creating comprehensive case plans, communication with families and school staff, and more. They have each worked within various school districts and nonprofits in California and have educational backgrounds (including several with psychology specific and MSW degrees) in child and adolescent development, communication, and leadership.

6. Please provide information on your organization's participation in local community, charitable and civic organizations and events:

As referenced above, PHA has a long-standing record of meaningful relationships with faith-based and other non-profit organizations throughout Orange County with whom we engage in mutually supportive partnerships to ensure all the needs of each individual we serve are met, even those we cannot provide directly. In addition to those described in detail in previous sections, these include, but are not limited to:

St. Andrews Presbyterian Church: St. Andrew's is located across the street from one of our primary service sites (Newport Harbor High School) and provides an afterschool space for students to study or wait for parents to pick them up. They also host a café, and a pantry with food and basic needs supplies for our youth. We have worked with them since 2013.

Orange County Department of Education: County liaisons coordinate government and community services to ensure that youth experiencing homelessness enroll and stay in school.

University of California, Irvine: UCI provides a virtual tutoring program for our youth, to help increase academic proficiency in math and language arts

Dream Schools: Dream Schools has recently engaged with the PHA team to start providing STEM opportunities for our 3rd to 8th grade youth.

Second Harvest Food Bank: For many years we have partnered with Second Harvest to provide food to our families.

Goodwill Industries: Goodwill partners with us to provide food, gifts, hygiene and toys for Santa Ana students and their families. They also provide thrift store vouchers, and wardrobe items for our employed students.

Families Forward: Families Forward has partnered with PHA for many years, serving as a referred housing provider for our families who need housing assistance.

Serving People In Need (SPIN): SPIN is also a referred housing provider, complementing our educational services, and increasing our ability to provide a wraparound service model that meets the full spectrum of needs presented by our families.

Youth Employment Service (YES): YES offers youth the skills needed to secure and maintain meaningful employment, serving as a bridge between young adults who are seeking employment and those in the local business community who are seeking capable employees.

Costa Mesa Chamber of Commerce: As of 2023, we are also a proud member of the Costa Mesa Chamber of Commerce.

Perhaps most notably, every year we partner with local companies, non-profit organizations, and funders to create numerous specialized extra-curricular opportunities for the kids we serve. This past summer, our team was hard at work creating opportunities for our students to partake in summer activities that would otherwise be financially out of reach for them. For example, our friends at Campus-by-the-Sea, an independent camp in Avalon on Catalina Island, offered our Middle Schoolers the opportunity to attend one of their June youth camps at half-price. To fund the cost of the camp, we reached out to our partners and they responded with \$12,465 in funds, underwriting the 15 youth and 3 case managers we sent to the camp, as well as a number of our other summer activities, including:

1. Beach day for Scholarship Prep Academy
2. Movie Day for 7-12
3. OCC Tour for high schoolers
4. Senior celebration at Knotts Berry Farm
5. Discovery Cube for K-6
6. Aquarium Trip for 5-12th
7. UCI Tour for high school
8. Skate Camp in San Clemente for middle school
9. Angel's Game for K-12
10. Hike Day in Laguna Beach for high school
11. Movie Day for K-6
12. Parent Workshop on Positive Communication with Children
13. Beach day for high school
14. Discovery Cube 7-12th
15. Cultural Museum in Long Beach for high school
16. Painting event for K-6
17. Career Day for high school
18. Art activity for 7-12
19. Movie Social for K-6
20. CSUF Tour for high school
21. CSUDH Tour for high school
22. Bi-weekly book club for K-6



MIDDLE/HIGH SCHOOL
(7TH-12TH GRADE)



OLDER YOUTH
(AGE 18-24)

23. Bi-weekly Math camp for 7-12
24. End of summer park day for K-12

We plan to replicate and expand upon these opportunities in Summer 2023. We have also initiated additional enrichment activities during the school year. These include, among others, Santa's workshops, where families are invited to "shop" for their children for the holidays (a more dignity-based approach to the holidays in lieu of traditional drives where families are pre-assigned gifts), several yearly drives including Thanksgiving, back-to-school, and winter gear (coats, blankets, space heaters). We have also added our inaugural Career Day in October 2022, which includes members of the community (e.g. law enforcement, chefs, nurses) and was a tremendous hit with our students. We intend to hold another of these in April of this year. In April we will also host a private concert by members of the Pacific Symphony in our community space for our students.

7. Additional information:

The majority of the services we provide and how we provide them both inside and outside Costa Mesa (including information about corresponding contracts and references) are detailed in our Scope of Work earlier in this proposal. However, we do remotely serve students at additional schools outside the districts listed above. These include students at Anaheim Elementary School in Anaheim; Esencia Elementary School in San Juan Capistrano; San Marino Elementary School in Centralia Elementary School District; Pacific Drive Elementary School in Fullerton; Cypress Village Elementary School, Deerfield Elementary School, Westpark Elementary School in Irvine; Skyview Elementary School and Rossier Elementary School in Orange; and E3 Academy in Placentia/Yorba Linda USD, as well as several individuals who have graduated high school and are now either in college, trade school, or employed (up to age 24).

8. Financial Capacity

We would be pleased to provide any additional data as mentioned, in order for the City to evaluate our firm's financial capabilities. (Note: this section did not directly ask for any financial information)

9. Key Personnel

The section below identifies the staff who will be assigned to act on behalf of PHA in key management and field positions, providing the services described in our proposal, and their functions:

Shelby Feliciano-Sabala, Chief Partnership Officer

Email: shelby.fs@projecthopealliance.org

Phone: (714) 640-7009

Education: BA from UC Santa Cruz in Psychology, MSW from University of Washington with a Global Health certificate, currently pursuing Educational Doctorate (EdD) in Educational Leadership at California State University, Long Beach.

Experience and Relevant Transactions: Worked in the nonprofit sector for 15 years, working with women and youth. Previously oversaw the Youth Volunteer program for Red Cross Orange County chapter where she was able to develop a Youth Advisory Council (YAC) and implement summer camp for 200 youth with 30 youth mentors. Afterwards she moved into direct service at the University of Washington, supporting survivors of sexual assault as well as youth needing health

and wellness services. She also worked with transitional age youth in workforce and education readiness. Most recently, she led the Department of Data & Evaluation at Think Together, California's largest expanded learning provider. As a social worker who has worked with vulnerable youth in different capacities for the past 15 years, she understands the intricacies and intersectionality of working with youth who have experienced trauma. As the Chief Partnership officer, she is responsible for creating and maintaining intentional relationships with community members that support our youth to thrive and create a meaningful impact story.

Rachel Cardenas, Chief Program Officer

Phone: 209.818.9710

Email: rachel@projecthopealliance.org

Education: B.A. Psychology, Dominican University; Psy.D. Clinical Psychology, Argosy University

Experience and Relevant Transactions: Worked as a therapist in schools with youth experiencing social, emotional, and behavioral issues and in inpatient and outpatient facilities with individuals experiencing severe mental health concerns. While working in the school system, Rachel also worked as a consultant for teachers and school staff regarding mental health, crisis intervention, behavioral interventions, and social skill development. Rachel worked at Gordon Psychology Group, where she led their clinical team, developed the training program, and was responsible for training and supervising therapists, case managers, and substance abuse counselors.

Lizbeth Loyola, Program Manager

Phone: 949-566-1643

Email: lizbeth@projecthopealliance.org

Education: Masters of Public Administration, National University

Bachelors in Sociology, California State University, Fullerton

Experience and Relevant Transactions: 8 years working with underserved communities and opportunity youth. Previously worked at Santa Ana and Orange unified school districts providing supportive services for elementary students. Four years of case management for youth and families experiencing homelessness providing resource referrals, mental health interventions and academic support. Majority of experience has been with marginalized communities primarily Latinx youth, LGBTQ+, single female headed households.

Guadalupe Contreras, District Manager

Email: gcontreras@projecthopealliance.org

Phone: (949) 872-1044

Education: BA Sociology & Communications

Experience and Relevant Transactions: Family and Community Engagement LIAISON SAUSD, 2019-2020. Facilitated Workshops for Parents to learn Skills such as typing, Navigating the Web, & Accessing Aeries for purpose of supporting students. Connected Families to appropriate resources such as Housing, WIC, Medical, Food Stamps and Child Care. She served one of Huntington Beach's most vulnerable communities in the Oak View region. Provided community and school resource information to parents and families (Connecting families and children to counseling, WIC, Rental Assistance programs, clothing assistance, extracurricular activities and events such as Dancing, soccer, boys and girls club, etc). Assessed crisis situations and connected clients to appropriate counseling care (Centralized Assessment Team, on-site counselors, off site counseling)

Chrissie Lee, Program Internship Manager

Phone: (949) 922-1573

Email: chrissie@projecthopealliance.org

Education: Master of Social Work Degree with a Pupil Personnel Services Credential, Bachelors of Arts degree in Human Development and minor in Human Resource.

Experience and Relevant Transactions: 13 years of experience working in the non-profit sector. She has worked with at-risk youths at her previous internships providing mental health support and case management services to students in an Elementary school. She has also worked with foster youth students (k-12) providing educational case management services and being their advocate/ support at IEP meetings, SARB, etc. Also worked with students who have a mental health diagnosis (ages 5 to 24) with Project FOCUS where she developed individualized service plans with specific goals and objectives, crisis intervention, and case management.

Daniel Hongo, Case Manager

Phone: 949-610-2752

Email: daniel.h@projecthopealliance.org

Education: BA Psychology, California State University, Fullerton

Experience and Relevant Transactions: Over 1 year of case management experience providing services to youth experiencing homelessness or housing insecurity. Over 4 years providing services to youth and adults in a behavioral health setting. Previously provided at-home services to children with autism spectrum disorder, using strategies to de-escalate crisis situations. He worked collaboratively with parents and colleagues to reduce the likelihood of harmful behaviors in children that pose dangers to themselves and/or others, as well as to reinforce safe and productive behaviors.

Kirya Valle, Case Manager

Telephone Number: (949) 402-5000

Email Address: kirya@projecthopealliance.org

Education: BA in psychology CSULB

Experience and Relevant Transactions: Kirya worked 6 mos at an inpatient mental health facility and 8 months as a research assistant. Through her work at PHA, she promotes independent living skills, social skills, and vocational rehabilitation with clients (students) experiencing homelessness. Provides support to individuals in developing academic skills and accessing resources needed to graduate high school, achieve a livable wage, and build a stable future. Monitors, observes, supports, and documents clients and their cases.

Catherine Balderrama, Case Manager

Phone: (657) 574-2000

Email: catherine.b@projecthopealliance.org

Education: Bachelor of Science in Child and Family Development - Completed at San Diego State University, Class of 2019. Currently pursuing a Master of Social Work - Boston University, expected graduation date is May 2025

Experience and Relevant Transactions: French Park Care Center Social Service Assistant– Orange County, CA (March 2021- July 2022). Provided essential information, managed requests and concerns, and helped in care planning and discharge planning. Communicated with other team members to enhance each patient's plan of care in wound management, behavior. Management

and care plan conferences with patient and family or responsible party. Completed assessments, acquired insurance authorizations, set doctor appointments and transportation

Tia Small, Case Manager

Email: fatiha@projecthopealliance.org

Phone: (949)531-1064

Education: Bachelor of Arts, Business Administration

Experience and Relevant Transactions: 3 years experience as a case manager in Fullerton and Costa Mesa School Districts. Tia has worked with marginalized youth for over ten years. In prior employment, she created and ran numerous educational programs for early learners and youth K-6. These programs were conducted on school campuses or city facilities. During that time, she also managed customer accounts, assisting with enrolling qualifying families in scholarship programs that aid with child services. Previously, she was a volunteer at Mercy House Women's Shelter.

10. Videos and Photos

In regard to photographs and videos as requested, we are pleased to provide you with the following pictures of our students working with their case managers, at holiday parties, and enjoying summer enrichment activities, as well as 2 videos that provide more insight into the work that we do. (Please note that because we are always cognizant of the dignity of the students we serve, their faces are never included in any pictures.)

Videos:

Project Hope Alliance: Generational Disruptors of Homelessness:

<https://www.youtube.com/watch?v=WF7E2mZdxIE>

<https://youtu.be/DA0b5VourLE>

Photos of our Program:



11. Case Studies (real stories of our youth)

While we rely on metrics and data, objectives and outcomes to quantify our impact, we also want to share some stories that communicate the personal impact we have had on our youth and their families:

One female senior has been accepted to five out of five colleges she applied to and will be the first in her family to attend college in the Fall. Her case manager assisted with applications, letters of recommendation, and applying for FAFSA.

A family of three kids and a single mother has been living in different motels for several years. With the support of their case manager, they have now entered into their first apartment and the kids are so excited to have a room of their own to share. This will be the very first time this family is able to have their own space.

We held an event for 10 kids (K-6) at PHA last month where they came together to play games while building social skills with the support of their case managers. All of the kids were so happy and excited to get together to be with their peers and to do something fun while they worked on communication and healthy relationships.

We helped three kids get their first jobs in one week through removing barriers to employment. Case managers provided emotional support, assisted with resume building, did interview practice, drove the kids to interviews, helped them with appropriate clothing, and accompanied them to local businesses to inquire about open positions.

One female junior high student got into an altercation on campus and was expected to be expelled. Her case manager was on site during the time and was able to calm the student and work with her to understand what led to the altercation. The case manager advocated for the student to the administration and provided additional information that resulted in her being given a chance to remain at school. The case manager worked with the school administration, principal, and school psychologist to develop a plan to support the student. Today, the student is working with her case manager daily on emotional regulation and anger management, and has a plan in place to prevent her from additional behavioral issues at school.

In June 2017, we sent two groups of youth to a teen camp at Gallegher's Bay, hosted by the camping organization Campus by the Sea, a 20-minute boat ride from Avalon harbor. The camp was gracious enough to cut their registration fees by half to make the week financially viable for us. During the week, the kids had the opportunity to ride the Catalina Express, live on the island for four days, sleep in cabins, and interact with 250 other kids from the mainland. Students listed off their "first-time" accomplishments such as "riding in a boat, visiting an island, hiking, eating s'mores, playing disc golf and volleyball, snorkeling, seeing fish in the ocean (and the elusive Catalina Island foxes) and disconnecting from phones, internet and technology for a week. Some of the comments at the end of the week were "This was the BEST trip", "Do we have to leave Catalina?", "I am having so much fun – I don't want to go home!" and "Can we come back next year?"

ATTACHMENTS



VENDOR APPLICATION FORM

FOR

RFP NO. 23-15 HOUSING RELATED SUPPORTIVE SERVICES FOR QUALIFYING POPULATIONS

TYPE OF APPLICANT: ☐ NEW ☒ CURRENT VENDOR

Legal Contractual Name of Corporation: PROJECT HOPE ALLIANCE

Contact Person for Agreement: KATHY KEIFE

Title: ACCOUNTING MANAGER E-Mail Address: KATHY @projecthopealliance.org

Business Telephone: (949) 791-2710 Business Fax: (949) 722-7836

Corporate Mailing Address: 1954 PLACENTIA AVE, SUITE 202

City, State and Zip Code: COSTA MESA, CA 92627

Contact Person for Proposals: JOHN BUMURIAN

Title: FOUNDATION RELATIONS MGR. E-Mail Address: john@projecthopealliance.org

Business Telephone: (714) 337-1118 Business Fax: (949) 722-7836

Is your business: (check one)

☒ NON PROFIT CORPORATION ☐ FOR PROFIT CORPORATION

Is your business: (check one)

☒ CORPORATION ☐ LIMITED LIABILITY PARTNERSHIP

☐ INDIVIDUAL ☐ SOLE PROPRIETORSHIP

☐ PARTNERSHIP ☐ UNINCORPORATED ASSOCIATION

Names & Titles of Corporate Board Members

(Also list Names & Titles of persons with written authorization/resolution to sign contracts)

| Names | Title | Phone /Email |
|-----------------|----------------|----------------------------------|
| LYNN HEMANS | CHAIR | sailingmom123@gmail.com |
| JOE LEWIS | VICE PRESIDENT | joelewis@uci.edu |
| PETE DEUTSCHMAN | SECRETARY | pete@thebuddygroup.com |
| RAY WESTON | DIRECTOR | rdwestonjr@gmail.com |
| ERIC RANS | DIRECTOR | erans@mrlp.com |
| SEAN BOULTON | DIRECTOR | sean.boulton@gmail.com |
| APRIL NEGRETE | DIRECTOR | april.negrete@gmail.com |
| WILLIE BANKS JR | DIRECTOR | wlbanks@uci.edu |
| JOSH FRIEND | DIRECTOR | josh@msellerate.com |
| DAWN BOUNDS | DIRECTOR | bounded@hs.uci.edu |
| JENNIFER FRIEND | CEO | jennifer@projecthopealliance.org |
| KATHY KIEFE | STAFF/ACCTG. | kathy@projecthopealliance.org |
| JOHN EUMURIANS | STAFF/GRANTS | john@projecthopealliance.org |

Federal Tax Identification Number:



City of Costa Mesa Business License Number: 43665


(If none, you must obtain a Costa Mesa Business License upon award of contract.)

City of Costa Mesa Business License Expiration Date: 5/31/2023

EX PARTE COMMUNICATIONS CERTIFICATION

Please indicate by signing below one of the following two statements. **Only sign one statement.**

I certify that Proposer and Proposer's representatives have not had any communication with a City Councilmember concerning informal **RFP No. 23-15 HOUSING REALTED SUPPORTIVE SERVICES FOR QUALIFYING POPULATIONS** at any time after **March 27, 2023**.



Signature

Date: 4/5/23

JOHN M. EUMURIAN

Print

OR

I certify that Proposer or Proposer's representatives have communicated after **March 27, 2023** with a City Councilmember concerning informal **RFP No. 23-15 HOUSING RELATED SUPPORTIVE SERVICES FOR QUALIFYING POPULATIONS**. A copy of all such communications is attached to this form for public distribution.

Signature

Date: _____

Print

DISQUALIFICATION QUESTIONNAIRE

The Contractor shall complete the following questionnaire:

Has the Contractor, any officer of the Contractor, or any employee of the Contractor who has proprietary interest in the Contractor, ever been disqualified, removed, or otherwise prevented from bidding on, or completing a federal, state, or local government project because of a violation of law or safety regulation?

Yes _____ No X

If the answer is yes, explain the circumstances in the following space.

DISCLOSURE OF GOVERNMENT POSITIONS

Each Proposer shall disclose below whether any owner or employee of Contractor currently hold positions as elected or appointed officials, directors, officers, or employees of a governmental entity or held such positions in the past twelve months. List below or state "None."

NONE.

COMPANY PROFILE & REFERENCES

Company Legal Name:

Company Legal Status (corporation, partnership, sole proprietor etc.): **NON-PROFIT CORPORATION**

Active licenses issued by the California State Contractor's License Board: **NONE**

Business Address: **1954 PLACENTIA AVE #202, COSTA MESA, CA 92627**

Website Address: **WWW.PROJECTHOPEALLIANCE.ORG**

Telephone Number: **(949) 722-7863**

Facsimile Number: **(949) 722-7836**

Email Address: **KATHY@PROJECTHOPEALLIANCE.ORG**

Length of time the firm has been in business: **34 YEARS**

Length of time at current location: **10 YEARS**

Is your firm a sole proprietorship doing business under a different name: ☐ Yes ☒ No

If yes, please indicate sole proprietor's name and the name you are doing business under: **N/A**

Federal Taxpayer ID Number: **[REDACTED]**

Regular Business Hours: **9:00 am - 5:00 pm**

Regular holidays and hours when business is closed: **CLOSED FOR ALL MAJOR HOLIDAYS AND ONE WEEK @ CHRISTMAS**

Contact person in reference to this solicitation:

Telephone Number: **(714) 337-1118**

Facsimile Number: **(949) 722-7836**

Email Address: **John@projecthopealliance.org**

Contact person for accounts payable:

Telephone Number: **(949) 791-2710**

Facsimile Number: **(949) 722-7836**

Email Address: **Kathy@projecthopealliance.org**

Name of Project Manager:

Telephone Number: **(209) 818-9710**

Facsimile Number: **(949) 722-7836**

Email Address: **rcardenas@projecthopealliance.org**

COMPANY PROFILE & REFERENCES (Continued)

Submit the company names, addresses, telephone numbers, email, contact names, and brief contract descriptions of at least three clients, preferably other municipalities for whom comparable projects have been completed or submit letters from your references which include the requested information.

Company Name: CITY OF SANTA ANA

Contact Name: DAVID FLORES

Contract Amount: \$180,000 (IN PROGRESS)

Email: dflores@santa-ana.org

Address: 20 CIVIC CENTER PLAZA, SANTA ANA, CA 92701

Brief Contract Description: \$90,000 TO SERVE 30 YOUTH AT CARNEGIE SHELTER
\$90,000 TO SERVE 30 SANTA ANA HOMELESS STUDENTS

Company Name: CITY OF HUNTINGTON BEACH

Telephone Number: (714) 536-5473

Contact Name: GREG HOANG

Contract Amount: \$20,854 (IN PROGRESS)

Email: gregory.hoang@surfcity-hb.org

Address: 2000 MAIN ST. HUNTINGTON BEACH, CA 92648

Brief Contract Description: SERVE OCEANVIEW AND WEST MINSTER HIGH SCHOOLS

Company Name: CITY OF SANTA ANA

Telephone Number: (714) 647-6900

Contact Name: MAYOR VALERIE AMEZCUA

Contract Amount: (SAME AS THE FIRST SECTION ABOVE)

Email: vamezcua@santa-ana.org

Address: 20 CIVIC CENTER PLAZA, SANTA ANA, CA 92701

Brief Contract Description: (SAME AS FIRST SECTION ABOVE)

Company Name: NEWPORT-MESA UNIFIED SCHOOL DISTRICT (NMUSD)

Telephone Number: (949) 515-6300

Contact Name: SEAN BOULTON, PRINCIPAL

Contract Amount: \$153,128

Email: SEAN.BOULTON@gmail.com

Address: 600 IRVINE AVE., NEWPORT BEACH, CA 92663

Brief Contract Description: SERVE HOMELESS NMUSD STUDENTS

Company Name:

Telephone Number:

Contact Name:

Contract Amount:

Email:

Address:

Brief Contract Description:



**BIDDER/APPLICANT/CONTRACTOR CAMPAIGN CONTRIBUTION
DISCLOSURE FORM**

Proposer/Consultant/Applicant is required to identify any campaign contribution or cumulative contributions greater than \$249 to any city council member in the twelve months prior to submitting an application, proposal, statement of qualifications or bid requiring approval by the City Council.

[illegible]

Except as described above, I/we have not made any campaign contribution in the amount of \$250 or more to any Costa Mesa City Council Member in the twelve months preceding this Application/Proposal.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.


Bidder/Applicant/Proposer

Bidder/Applicant/Proposer

4/12/23

Date _____



City of Costa Mesa
Development Services
Attn: Stephanie Urueta

April 10, 2023

RE: HOUSING-RELATED SUPPORTIVE SERVICES FOR QUALIFYING POPULATIONS RFP 23-15

Thank you for the opportunity to submit this proposal for Housing-Related Supportive Services for Qualifying Populations. The goal of the program is to fill supportive service gaps including mental health services, substance abuse services, legal services, wrap-around services, transportation services, landlord-tenant relations (including emergency rental assistance) and credit repair. The supportive services will help ensure eligible Costa Mesa residents remain stably housed.

Our proposed program "Journey to Self-Sufficiency" (JTS) specifically targets the needs of transition-aged, homeless and at-risk youth (ages 18-24) in Costa Mesa. StandUp for Kids-OC will provide 20 homeless youth/families, ages 18-24, full wrap-around support while leading them from crisis to self-sufficiency. Our services include: 1) basic needs (food and hygiene, healthcare, self-care, counseling, transportation); 2) mentoring (life skills, job skills, career counseling, tutoring, employment navigation and work experience); 3) housing support (emergency shelter and rental assistance); and 4) drop-in centers (safe space for meeting, mentoring, counseling, studying, and meals).

We identify homeless Costa Mesa youth during weekly street outreach and through referrals from local law enforcement, schools, crisis hotlines, healthcare agencies and youth organizations. We invite the youth to participate in the SUFK five-step "Journey to Self-Sufficiency" (JTS). Upon agreement, each youth is assigned a mentor, and the youth undergoes a thorough needs assessment and health check where we confirm their current resources, urgent needs and screen for substance use. The mentor builds a trusted relationship with the youth and provides direction, support, encouragement, and accountability, while the youth develops a sense of competence, usefulness, belonging, and empowerment. The mentor guides the youth through the proven JTS process which follows guidelines from the US National Interagency for Homeless Services. Notably, the SUFK-OC JTS program has been adopted by other agencies serving at-risk youth in Orange County. On average, the JTS mentoring process takes 4-6 months for the youth to complete, at which time the youth is typically self-sufficient and stably housed in permanent housing.

PO Box 14398, Irvine CA 92623-4398 * (714)356-KIDS (5437) * www.standupforkids.org

The youth receive tapered rental assistance and monthly mentoring until their 12-month check-in, when the program officially ends. The mentor-mentee relationship often continues well beyond the end of the program and many of our clients remain connected to StandUp for Kids-OC as volunteers or staff, helping other youth end the cycle of homelessness.

Through this grant, 20 new, at-risk Costa Mesa youth (5 per quarter), will enter and complete the JTS program. The expected outcome is for each mentored youth to remain stably housed and self-sufficient at their 12-month check-in (based on our proven track record of 99% success).

The total cost of the Costa Mesa Journey to Self-Sufficiency Youth Mentoring program for 20 youth is \$107,537. SUFK requests \$72,348 to fund the paid program staff, housing assistance and support expenses. The remaining \$35,189, will be covered by SUFK matching funds and covers the cost of internships, mentors, tutors, community outreach, insurance and telecom expense.

SUFK-OC, founded in 2003, is located at 1055 El Camino Dr. Suite E, Costa Mesa, CA 92626. Our mission is to end the cycle of youth homelessness, one youth at a time. We have over 20 years of experience serving homeless and at-risk youth (ages 12-24) across Orange County. In 2022, we served 1,078 unduplicated OC youth. 100% of our mentored school age youth graduated and 99% of our mentored youth, ages 18-24, remained stably housed and self-sufficient at their 12 month check-in.

We currently provide homeless/at-risk youth services in Anaheim, Garden Grove, Huntington Beach, Irvine, Mission Viejo, Santa Ana, and San Juan Capistrano in addition to 5 OC School Districts and Orange County Access (continuation) Schools. We also provide Rapid Rehousing (RRH) services in Irvine, Garden Grove and Anaheim. We have successfully executed over 20 government contracts across Orange County that include street outreach, wrap-around support services, and rapid-rehousing. In all cases, we met the service goals, expended all funds and had no audit findings.

We believe that the StandUp for Kids-OC, "Journey to Self-Sufficiency" youth mentoring program aligns directly with The City of Costa Mesa goals to provide supportive services and housing assistance to vulnerable populations. Each youth served will remain stably housed and become a self-sufficient, productive citizen of Costa Mesa, therefore, ending the cycle of homelessness. We look forward to partnering with the City of Costa Mesa on this important program.

Sincerely,



Justine Palmore
Executive Director, Orange County

CITY OF COSTA MESA
HOUSING-RELATED SUPPORTIVE SERVICES FOR QUALIFYING POPULATIONS
RFP NO. 23-15
PROPOSAL FROM STANDUP FOR KIDS - ORANGE COUNTY

1. Background and Project Summary

A. Describe your understanding of the City, the work to be done, and the objectives to be accomplished.

The City of Costa Mesa, is a full-service City, located in Orange County, CA. The City's homeless strategy is based on the proposition that it is less expensive and disruptive for a household to remain housed in their existing home than to be rehoused. To this end, the City will focus its resources on agencies that provide various safety-net services to prevent households from becoming homeless. The City will support programs that provide low-cost meals, counseling, and employment/job skills development services for lower-income individuals.

The City seeks to provide Housing-related supportive services for Qualifying Populations within the City. Supportive service gaps identified in the Allocation Plan include mental health services, substance abuse services, legal services, wrap-around services, transportation services, landlord- tenant relations (including emergency rental assistance) and credit repair.

Supportive services are identified as one of four activities eligible for HOME-ARP funding. HOME-ARP funds may be used to provide a broad range of supportive services to qualifying individuals or families. Supportive services include: a) services listed in section 401(29) of the McKinney Vento Homeless Assistance Act ("McKinney-Vento Supportive Services") (42 U.S.C. 11360(29)); b) homelessness prevention services, and c) housing counseling services.

The work to be done by SUFK OC includes:

1. Actively market or assist the City with client outreach and program engagement services.
2. Assist individuals and families in completing intake and verification forms accurately.
3. Develop and maintain appropriate and accurate client and administrative records, and make program records available to the City, HUD, and/or Office of Inspector (OIG) for any monitoring or audits that may be required to ensure program compliance.
4. Select participants that meet the definition of a qualifying population and maintain documentation supporting that this requirement is met.
5. If necessary, provide non-English language interpreter to eligible households.
6. Submit quarterly program status reports to the City of Costa Mesa including information regarding supportive services provided. The report would be due by the fifteenth day of the month after the end of the quarter.
7. Submit other reports and program information as requested by the City.

The City is responsible to HUD for the oversight of the Program and compliance with applicable federal requirements, including the HOME-ARP requirements outlined in Notice CPD-21-10. This will include, but not be limited to, the following:

1. Review program forms and documents.
2. Completing necessary environmental reviews.
3. Provide referrals per HUD guidelines and the City of Costa Mesa program guidelines.
4. Retain the sole authority to determine eligibility for all referrals submitted by the vendor.
5. Provide training and technical assistance to the vendor's staff and notify the vendor of changes in

regulations, policy, rules, or key City of personnel assigned to the HOME-ARP program.

6. Monitor the vendor's performance by reviewing quarterly reports, including a review of documentation of all supportive services provided and other documentation to ensure program compliance.

2. Method of Approach:

A. Provide a detailed description of the approach and methodology that will be used to fulfill each requirement listed in the Scope of Work.

StandUp for Kids OC only serves the youth population (ages 12-24). Youth have vastly different needs than adults experiencing homelessness. Most have experienced traumatic events before they left home and are traumatized again, while on the street. Homeless youth have significant mental health problems. In 2022, 38% had significant mental health problems, including depression, anxiety disorders, PTSD, suicidal ideation, and substance addiction. 17% used drugs (opiates (64%), methamphetamines (11%), pills and marijuana (16%), and alcohol (9%)). 27% have children, 22% were in foster care, and 29% experienced domestic violence. Over half of the girls we served experienced human trafficking, rape, and/or pregnancy.

Each youth that enters the SUFK OC mentoring program, receives immediate emergency health services, shelter, and basic needs. We provide full wrap-around support during the 6 month mentoring program, including: 1) basic needs (e.g. food and hygiene, healthcare, counseling, transportation); 2) mentoring (life skills, job skills, career counseling, tutoring and experiential learning through internships); 3) housing support (emergency shelter, housing navigation and transition, rental assistance); and 4) drop-in center access (safe space for meeting, mentoring, counseling, training, and meals).

When we identify a youth, ages 18-24, in crisis, we invite them to participate in the SUFK five-step "Journey to Self-Sufficiency" (JTS). Upon agreement, we assign a mentor, and the youth undergoes a thorough needs assessment and health check to confirm their current resources and urgent needs and screen for substance use. The case manager oversees the youths' progress and arranges medical, behavioral, education, housing, and financial services with the support of the SUFK housing navigator and employment navigator. Tutors provide each youth with educational support throughout the program, as needed.

The primary outcome of the JTS program is for each youth to remain stably housed and achieve self-sufficiency. The JTS mentoring program takes on average, 6 months and 99% youth mentored in 2022, remained stably housed and self-sufficient at their 12-month check-in. The key to our success is the trusted relationship developed between the youth and the mentor, who provides direction, support, encouragement, and accountability. The mentor's goal is to see each youth develop a sense of competence, usefulness, belonging, and empowerment. To achieve this, the mentor guides the youth through the 5-step JTS process: 1) Basic Needs (housing, food, clothing, transportation, rehab, healthcare, self-care), 2) Employment Readiness (ID, resume, attire), 3) Employment Retention (professionalism, timeliness, job skills), 4) Financial Awareness (budgeting, banking, bills, and taxes), and 5) Personal Skills and home management (decision making, personal boundaries, communication, homemaking, rental agreements, leases, deposits). The JTS 5-step program follows guidelines from the US National Interagency for Homeless Services. Notably, the program has been adopted by agencies across Orange County serving homeless and at-risk youth.

We implement specific measures and controls to ensure the success of each client.

1) We measure key emotional assets using a 37-item Youth Asset Survey, administered upon entry to the program and repeated after 6-months. This nationally-recognized survey assesses internal assets such as self-esteem, values, and goals, plus external supports such as role models and community involvement.

2) We assess program performance and progress on a weekly basis. The case manager is responsible for monitoring the progress of their clients. We use benchmarks to assess readiness for the next step of the program and to measure progress over time. Benchmarks include all the criteria to move through the five steps of JTS. For example, in order to pass through Step 2, Employment Readiness, the youth must meet these benchmarks: 1) receive their Government ID, 2) have an up-to-date and professional resume, and 3) have professional attire for work.

3) The mentor works with the youth to establish and achieve personal milestones, such as completing a sobriety program, getting a GED, repaying debt or reuniting with family.

Both benchmarks and milestones are vital, not only to ensure completion of the program, but to build confidence and to learn accountability.

The proposed Program Schedule, tasks and deliverables to serve 20 Transition Aged Youth (TAY) per year (ages 16-24):

| Timeline | Objective | Activities | Deliverables |
|-----------------|---|--|--|
| Dates TBD | Intake 5 at-risk/homeless Youth per quarter: | 1. Conduct Weekly Street Outreach 2. Safely House Youth 3. Assign Mentors 4. Complete Intake/Verification Process 5. Evaluate Emotional Attributes | Per Quarter: 1. Screen 5 homeless/at risk 2. Intake 5 homeless/at risk 3. House 5 homeless/at risk |
| Dates TBD | Youth complete JTS Mentoring Program (Avg. 6 months from intake) | Complete JTS Stages: 1. Basic Needs and Housing 2. Employment Prep / Internship 3. Employment Retention 4. Financial Awareness 5. Personal and Household Mgmt. Re-evaluate Emotional Attributes at 6 months. | Per Quarter (6 months after intake): 1. 5 TAY Complete JTS 2. 5 TAY Identify Permanent Housing 3. 5 TAY Improve in at least one emotional attribute |
| Dates TBD | Youth Remain Self-Sufficient and Stably Housed (1 year from intake) | 1. Maintain Mentoring Relationship 2. Confirm Stable Employment 3. Confirm Stable Permanent Housing | Per Quarter (1 year from intake) 1. 5 TAY remain Self-Sufficient at 12-month check-in 2. 5 TAY remain Stably Housed at 12-month check-in |

StandUp for Kids OC provides innovative and creative approaches to meet the needs of OC youth. StandUp for Kids OC is a volunteer driven organization, which ensures our costs remain low. We have over 100 volunteers, fully trained and supervised by SUFK staff, serving as mentors and tutors, delivering supplies and supporting all programming. In addition, our mentoring program provides full wrap-around support to each youth in the Program, including basic needs, mentoring and access to our “Drop-In” center in Costa Mesa. The SUFK OC “Journey to Self-Sufficiency” (JTS) mentoring program is the key to our success, built on the trusted relationship developed between the youth and the mentor.

Furthermore, in 2020 StandUp for Kids OC created the Work Activation Readiness Program (WARP), partnering with local businesses to provide youth work experience (internships) that lead to future gainful employment. In addition, in 2021, SUFK OC developed a partnership program with local landlords to increase the supply of affordable housing for youth that complete the JTS mentoring program.

SUFK OC will meet each of the responsibilities in the Scope of Work, as follows:

1. Actively market or assist the City with client outreach and program engagement services.

SUFK developed deep partnerships during the past 20 years serving youth in Orange County. In each city served, we partner with law enforcement, courts, youth organizations, schools, and public colleges and universities to obtain direct referrals. Within Costa Mesa, we coordinate with the Network for Homeless Solutions (NHS) to obtain referrals. In addition, we are either members or collaborators with many county-wide agencies serving at-risk youth, including OC211, the OC TAY (Transition Aged Youth) Collaborative, Orange County Human Trafficking Task Force, and OC United to End Homelessness (through United Way).

We work closely with the Orange County Continuum of Care (CoC) and its Coordinated Entry System (CES) and refer clients to CES's participating agencies. The CoC and the Coordinated Entry System (CES) involve many organizations serving at-risk youth with the goal of improving the efficiency and quality of our unified efforts across Orange County.

SUFK OC also performs weekly street outreach within the City to locate at-risk youth where typically hang out. During this process we screen individuals and provide basic needs such as food, water, hygiene items and clothing. We invite youth to participate in the SUFK OC mentoring program and provide referrals to help meet each individual's needs.

2. Assist individuals and families in completing intake and verification forms accurately.

When we identify a youth in crisis (ages 18-24), we invite them to participate in the SUFK five-step "Journey to Self-Sufficiency" (JTS). SUFK OC follows a standard, HUD compliant, telephone intake process, whereby full demographic information is recorded on the appropriate HUD-approved form.

The intake process includes verifying eligibility for specific programs (e.g., Costa Mesa ties), and accurate completion of verification forms, per program requirements.

3. Develop and maintain appropriate and accurate client and administrative records, and make program records available to the City, HUD, and/or Office of Inspector (OIG) for any monitoring or audits that may be required to ensure program compliance.

The SUFK OC Case Manager is responsible for the accuracy of the client file and administrative records pertaining to the client and the contract. The client file includes intake and eligibility forms, meeting attendance records, support services provided and progress reports from the JTS Mentoring Program. In addition, SUFK OC adheres to all City, HUD and OIG requirements required by the contract. Per the Statement of Work, SUFK OC will maintain and submit adequate information necessary to monitor program accountability and progress in accordance with the terms and conditions of the HOME-ARP program and the executed Agreement. Quarterly program progress reports will be provided. Invoices will be submitted within 60 days after the end of each month.

Over the past 20 years, SUFK OC has performed over 20 government contracts with zero audit findings.

4. Select participants that meet the definition of a qualifying population and maintain documentation supporting that this requirement is met.

SUFK OC will select participants that meet the definition of qualifying population under the City of Costa

Mesa contract requirements. The SUFK OC intake process includes verifying eligibility for specific contracts (e.g., Costa Mesa HOME), and accurate completion of the verification forms, per contract requirements.

Qualifying Populations for the Costa Mesa HOME contract include:

1. Homeless, as defined in 24 CFR 91.5 Homeless (1), (2), or (3).
2. At risk of Homelessness, as defined in 24 CFR 91.5 At risk of homelessness
3. Fleeing, or Attempting to Flee, Domestic Violence, Dating Violence, Sexual Assault, Stalking, or Human Trafficking, as defined by HUD. 24 CFR 5.2003
4. Other Populations where providing supportive services or assistance under section 212(a) of NAHA (42 U.S.C. 12742(a)) would prevent the family's homelessness or would serve those with the greatest risk of housing instability. HUD defines these populations as individuals and households who do not qualify under any of the populations above.
5. If necessary, provide non-English language interpreter to eligible households.

SUFK OC provides both English and Spanish language Case Managers, mentors, and tutors. Should the need arise, SUFK OC will provide a language interpreter to eligible households.

6. Submit quarterly program status reports to the City of Costa Mesa including information regarding supportive services provided. The report would be due by the fifteenth day of the month after the end of the quarter.

SUFK OC will provide quarterly program status reports to the City of Costa Mesa. With this grant, the goal is to engage 5 new youth per quarter (20 total for the year). The “Journey to Self-sufficiency” (JTS) program begins when a youth agrees to enter the program and ends when the youth completes the 5-step JTS program, is self-sufficient, and stably housed (typically 6 months). The journey formally concludes with a follow-up check-in meeting at 12 months to assess their stability. The expected outcome is that each youth that enters JTS will remain stably housed and self-sufficient through their 12-month check-in (based on our proven track record of 99% success).

7. Submit other reports and program information as requested by the City.
SUFK OC will provide the City of Costa Mesa other reports and program information, as requested.

Per the City requirements, City staff will perform the following tasks:

1. Review program forms and documents.
2. Complete necessary environmental reviews.
3. Provide referrals per HUD guidelines and the City of Costa Mesa program guidelines.
4. Retain the sole authority to determine eligibility for all referrals submitted by the vendor.
5. Provide training and technical assistance to the vendor's staff and notify the vendor of changes in regulations, policy, rules, or key City of personnel assigned to the HOME program.
6. Monitor the vendor's performance by reviewing quarterly reports, including a review of documentation of all supportive services provided and other documentation to ensure program compliance.

3. Qualifications & Experience of the Firm

A. Describe the qualifications and experience of the organization or entity performing services/projects within the past eight years that are similar in size and scope to demonstrate competence to perform these services.

StandUp for Kids Orange County (SUFK-OC), founded in 2003, serves OC youth (ages 12 – 24) who are

runaways, homeless, at-risk, and aging-out of foster care. StandUp for Kids is a National non-profit corporation founded in 1990, with 16 chapters, each with a common mission to end the cycle of youth homelessness, one youth at a time. Local address and contacts for StandUp for Kids OC:

- Executive Director: Justine Palmore
- Housing and Mentoring Program Director: Denise Zermeno
- Physical Location: 1055 El Camino Dr. Ste. E, Costa Mesa, CA 92626
- Mailing address: P.O. Box 14398 Irvine, CA 92623
- Web address: <https://www.standupforkids.org/orangecounty/>
- Telephone: 714-356-5437
- Tax ID: 33-0414855

National address and contacts for StandUp for Kids:

- 200 Nelson Ferry Road, Suite B, Decatur, GA 30030
- Telephone: 1-800-365-4KID (1-800-365-4543)
- Email: staff@standupforkids.org
- National Board of Directors (see appendix C Forms):

In addition, each chapter, including Orange County, maintains a Board of Advisors that directs local programming.

SUFK-OC received a total of 25 federal grants in the past 5 years (listed below). For each grant we met or exceeded our service numbers, expended all funds awarded, and had no audit findings. Services included:

- Street Outreach/Referrals/Screening/Qualification
- Youth Intake/Approval/Client File Management
- Voucher Acquisition/Management
- Housing Navigation/Market Evaluation/Selection/Waitlist
- Housing Evaluation/Inspection/Re-Inspection
- House Setup/Transition
- Housing Support/Maintenance
- Landlord Relations/Contracts/Disputes/Terminations
- Rental Assistance/Recordkeeping (Rent, Utilities, Deposits, Insurance, etc.)
- Client mentoring/training/coaching and support.
- Program and contract management/expense reimbursement/reporting

| Year | Agency | Program Name | Grant |
|-----------|--------------------------|--|--------------|
| 2017-18 | City of Irvine | Outreach for Homeless | \$10,000.00 |
| 2017-18 | City of Newport Beach | Street Outreach for Homeless | \$5,000.00 |
| 2017-18 | City of Fullerton | Outreach for Homeless | \$5,000.00 |
| 2018-19 | City of Irvine | Outreach for Homeless | \$15,926.00 |
| 2018-19 | City of Huntington Beach | Street Outreach for Homeless | \$5,000.00 |
| 2019-2020 | City of Huntington Beach | Street Outreach | \$15,000.00 |
| 2019-2020 | City of Laguna Niguel | Street Outreach | \$1,000.00 |
| 2019-2020 | City of Irvine | Street Outreach | \$19,826.00 |
| 2019-2020 | City of Mission Viejo | Street Outreach | \$4,500.00 |
| 2020-2021 | City of Huntington Beach | Street Outreach | \$15,000.00 |
| 2020-2023 | City of Irvine | ESG Rapid Rehousing Contact: See Appendix C | \$257,188.00 |
| 2020-2023 | City of Garden Grove | Work Activation & Readiness | \$150,000.00 |
| 2020-2021 | City of Laguna Niguel | Street Outreach | |

| | | | |
|-----------|---------------------------|--|--------------|
| 2020-2021 | City of Anaheim | ESG Rapid Rehousing | \$33,000.00 |
| 2021-2023 | City of Garden Grove | ESG RRH and Street Outreach Contact: See Appendix C | \$102,303.00 |
| 2021-2023 | City of Anaheim | ESG Rapid Rehousing Contact: See Appendix C | \$68,796.00 |
| 2021-2022 | City of Mission Viejo CSF | Street Outreach Consumables | \$5,000.00 |
| 2021-2022 | City of Laguna Niguel | Street Outreach | \$1,000.00 |
| 2021-2023 | City of Irvine | Street Outreach & Apt Support | \$59,932.00 |
| 2021-2022 | City of Irvine | Street Outreach | \$12,177.00 |
| 2022-2023 | City of Mission Viejo | Street Outreach | \$2,500.00 |
| 2022-2023 | City of Mission Viejo CSF | Street Outreach Consumables | \$5,000.00 |
| 2022-2023 | City of Huntington Beach | Street Outreach | \$14,652.00 |
| 2022-2023 | City of Laguna Niguel | Street Outreach | \$3,500.00 |
| 2022-2024 | City of Santa Ana | Homeless Services – Century High | \$54,000.00 |
| 2023-2025 | City of Irvine | Irvine Recovery Plan -JTS Mentoring | \$113,261.00 |

Below is a list of the SUFK-OC unique qualifications to perform the Scope of Work:

1. SUFK OC specializes in serving homeless and at-risk youth (ages 12-24). We only serve this population, as their needs are unique, compared to homeless/at-risk adults.
2. We achieve results. In 2022, 100% of our mentored school-aged youth (ages 12-17) graduated (102 enrolled youth) and 99% of our mentored transition-aged youth (ages 18-24) remained stably housed and self-sufficient at their 12-month check-in (268 enrolled youth).
3. SUFK OC, founded in 2003, has 20 years of experience providing housing solutions for homeless and at-risk OC youth ages (12-24).
4. The SUFK OC staff has a combined 40 years of experience serving homeless and at-risk youth in Orange County. Our team of case managers and mentors receive continuous training in order to provide the most comprehensive care possible and ensure the use of best practices. Training includes trauma-informed care, education on client history of adverse childhood experiences, implicit bias identification, mental/behavioral health and coping strategies. Additionally, we have mentors from all backgrounds, cultures and experiences, therefore, we are able to make a positive mentor match with each youth.
5. Over the past 20 years, we developed deep partnerships with many OC organizations serving homeless and at-risk youth, including law enforcement, courts, foster care, healthcare, education, OC 211, youth organizations and the Costa Mesa Network for Homeless Solutions (NHS). As a member of the OC Continuum of Care (CoC), we work collaboratively with OC organizations serving homeless youth including the OC CoC, OC TAY Collaborative, OC Human Trafficking Task Force, OC United to End Homelessness, CityNet and more.
6. SUFK OC has successfully completed over 20 contracts with OC government entities. In each of these contracts, we met each service goal, expended all funds and had no audit findings.
7. Our proven mentoring programs follow guidelines from the US Interagency Council on Homelessness and notably our programs have been adopted by organizations across Orange County serving at-risk youth.
8. We have highly satisfied customers that demonstrate their satisfaction through excellent references and repeat contracts.

5. Financial Capacity

StandUp for Kids Orange County has grown significantly each year as a result of our clients' success and our dedicated service to the community. The SUFK-OC budget doubled over the past 2 years to \$1.194M in 2023. Estimated funding sources in 2023 include:

- 1) City/County: 30%
- 2) Fundraising: 25%
- 3) Corporate and Foundation Grants: 15%

- 4) Private Donations: 15%
- 5) In-Kind Donations: 15%

We will provide more information regarding our financial resources, upon request.

6. Key Personnel

Staff members at SUFK-OC have accumulated over 40 years' experience providing services to at-risk and homeless youth. The following persons will be principally responsible for working on the program:

- 1) Justine Palmore, Executive Director (joined SUFK in 2006), B.S. Human Services. She is responsible for oversight of StandUp for Kids Orange County operations, finance, human resources and reporting.
- 2) Carlia Oldfather, Director of Program and Business Operations (2016), B.S. in Human Services. She is responsible for client case management, case management oversight, volunteer management, database management and HMIS functions.
- 3) Denise Zermeno, Director of Housing and Mentoring Programs (2018), B.S. in Child and Adolescent Development. She is responsible for implementation and outcomes for all City and County grants. She oversees and trains the program mentors and is responsible for supervising both the housing and mentoring program staff.
- 4) Xiomara Cabrera, Mentoring Program Manager (2019), B.S. in Child Adolescent Studies. She is responsible for all preventive programming. She oversees both staff and volunteers, assigns the mentors and monitors client progress.
- 5) Veronica Hernandez, Case Manager (2021), B.A. in Sociology. The Case Manager monitors client progress and coordinates client services including mentors, tutors, food and hygiene supplies and community supports.
- 6) Samantha Beer—Housing Coordinator (2020), B.A. in Psychology. The coordinator assists case managers by guiding them on where to locate, secure, and retain affordable permanent housing for their clients.
- 7) Elle Martinez- Employment Navigator (2020), B.A. in Psychology. The navigator assists case managers and clients to locate, secure, and retain work experience, paid internships, and permanent employment. She helps clients prepare for stable employment through training and workshops.

In addition, StandUp for Kids Orange County has over 100 trained volunteers who are highly skilled, trained and supervised to support all programming. See the resumes of key personnel below:

Justine Palmore (16 years w/SUFK OC)
Executive Director
B. S. Human Services

- Oversees all programs, services, and operations.
- Responsible for all HUD contracts including contract negotiation, monitoring, billing and compliance.
- Justine is responsible for raising the organization budget of 1.3m annually.
- Evaluates trends in needs & gaps & develops programs to meet those needs.
- Sets annual goals and objectives and manages to accomplish them.
- Develops and maintains collaborative relationships with community partners including the local Continuum of Care, housing facilities, donors, funders, agencies and programs, to successfully deliver services to youth and their families.
- Develops and maintains relationships with elected government officials to advocate for needs and service opportunities.

- Ensures internal audits are completed including audits of client files, internal databases, external databases (compliance with Homeless Information Management System), safety protocols, grant reports, and fiscal controls, etc.
- Responsible for fiscal management and budget tracking.
- Responsible for Human Resources and Payroll departments and oversees employee recruitment, training, retention, performance evaluations, and time tracking.
- Oversees fundraising, communications, and community outreach in collaboration with Development & Communications department.
- Facilitates regular management and staff meetings; communicating site program, goals and objectives.
- Applies over 40 years of experience in finance and entrepreneurship.

Denise Zermeno
Director of Housing and Housing Programs (5 years w/ SUFK OC)
B.S. Child & Adolescent Studies

- Provides oversight for Housing Programs and housing components of other programs within StandUp for Kids Orange County including ensuring successful implementation, evaluation and coordination of services.
- Ensures that programs successfully integrate client supportive services and housing components to stabilize and improve participant outcomes.
- Ensures that programs are in compliance with funding regulations, program goals, and stakeholder expectations.
- Provides high level program development, goal setting, and engagement with external stakeholders specific to each program.
- Collaborates regularly with agency management. Participates in regular Senior Management meetings with the Executive Director, and Director of Business & Program Operations to manage finances, human resources, and program operations.
- Provides coaching and direct supervision to all supervised staff. Provide regular and appropriate feedback including training, opportunities for professional growth, verbal and written improvement plans when needed, and regular evaluations.
- Works collaboratively with SUFK OC managers and directors to ensure that a culture of outcome driven performance is maintained, focused on data driven results.
- Assists in the creation of the SUFK annual report that describes all service outcomes for internal and external stakeholders.
- Maintains effective public relations. Develops relationships with the community. Serves as a spokesperson for SUFK when called upon.

Carlia Oldfather (7 years w/ SUFK OC)
Director of Program and Business Operations
B. S. Human Services

- Experienced in all SUFK OC departments (with exception of Marketing & Fundraising).
- Responsible for contract negotiations, and managing all programs to successful conclusion
- Maintains all SUFK OC business systems, including database and reporting systems.
- Performs HMIS Administration for SUFK OC.
- Performs HR representative duties for SUFK OC.

- Manages business operations, ensuring SUFK OC team members have the tools and training to do their jobs effectively and efficiently.
- Applies past management experience as army intelligence officer and casino floor manager.

Xiomara Cabrera (4 years w/ SUFK OC)
Mentoring Program Manager
B. S. Adolescent Studies

- Responsible for the overall management of all current programming and new programming.
- Responsible for oversight of Anaheim Center site coordinator and all In School mentoring sites, volunteers, interns, tutors and mentors, as assigned by the Director of Mentoring & Housing Programs.
- Implements program policy and procedures.
- Conducts training of program coordinators, interns, tutors, volunteers, and youth participants.
- Communicates with contractor personnel and community members to achieve program goals.
- Gather information to evaluate and adjust programming, as needed.
- Supervise volunteers, tutors and assist/oversee all programming assigned.
- Represent program in related committees, groups and community functions.
- Oversee communication, records, and documentation of all programming assigned.
- Oversee program budgets, petty cash, and financial controls.

Veronica Hernandez
Case Manager (2 years w/SUFK OC)
B.A. Sociology

- Conducts outreach as necessary to find clients where they are, to provide services they need, with the mutual goal of becoming self-sufficient and stably housed.
- Provides holistic case management by conducting comprehensive screenings and assessments with individuals (or families) to collect functional, environmental, psychosocial, financial, employment, housing, educational, and health information.
- Assesses the barriers that clients are facing and develops a case management plan.
- Manages volunteer support team providing client support.
- Coordinates the case management plan with clients to meet their short and long term goals.
- Provides service linkages and supports systems to ensure client needs are met, such as health care, hygiene items, and referrals to other agencies for permanent supportive housing.
- Performs crisis intervention, as needed, and counsels client by confronting issues adversely affecting their lives, such as mental illness, addiction, and abuse.
- Completes Client Outcome Matrix and uses Database and HMIS to track and maintain accurate case notes and client and program data files.
- Collaborates with the Case Management Team by attending weekly meetings to discuss the effectiveness of programs and client progress, and create new strategies to meet client's level of need and improve plans.
- Establishes and maintains confidential case files for clients and prepare required statistical reports for program management and evaluation.

Samantha Beer
Housing Coordinator (3 years w/ SUFK OC)
B.A. Psychology

- Coordinates client housing needs for SUFK OC including Rapid Rehousing, Emergency Housing, Temporary Housing, and Permanent housing, including voucher management.
- Establishes partnerships with property owners and managers, building strong working relationships. Aims to increase access to housing for clients. Collaborates effectively with coworkers and partner organizations to support a positive housing experience.
- Coordinates client home inspections and repair requests, as needed.
- Establishes procurement relationships and inventory management protocols in accordance with HUD directives.
- Identifies and secures safe, sanitary, and affordable housing for newly arriving clients in compliance with established program requirements.
- Coordinates logistics of housing set-ups including acquiring furniture and supplies and arranging delivery, arranging utility hook-ups, facilitating lease signing and renewal, arranging payments, and conducting home safety inspections.
- Coordinates logistical activities related to case management services including transportation and interpretation support provided by interpreters and other team members.
- Coordinates the delivery of orientation training for clients.
- Provides accurate recordkeeping to meet all program requirements.
- Maintains client files and reviews in accordance with HUD and program requirements.
- Coordinates HMIS reporting and maintenance.
- Prepares all QPRs, CAPER reports for programs.
- Manages a team of staff, volunteers, and interns in accordance with SUFK Standards.



VENDOR APPLICATION

FORM FOR

RFP NO. 23-15 HOUSING RELATED SUPPORTIVE SERVICES FOR QUALIFYING
POPULATIONS

TYPE OF APPLICANT: **X** NEW **0** CURRENT VENDOR

Legal Contractual Name of Corporation: StandUp for Kids_____ Contact

Person for Agreement: Justine Palmore_____

Title: Executive Director_____ E-Mail Address: JustineS@Standupforkids.org

Business Telephone: 714-356-5437_____ Business Fax: _____

Corporate Mailing Address: P.O. Box 14398_____

City, State and Zip Code: Irvine, CA 92623_____

Contact Person for Proposals: Justine Palmore@StandUpforKids.org_____

Title: Executive Director E-Mail Address: JustineS@StandupforKids.org

Business Telephone: 714-356-5437 Business Fax: _____

Is your business: (check one)

X NON PROFIT CORPORATION

☐ FOR PROFIT CORPORATION

Is your business: (check one)

X CORPORATION

0 LIMITED LIABILITY PARTNERSHIP

0 INDIVIDUAL

0 SOLE PROPRIETORSHIP

☐ PARTNERSHIP

0 UNINCORPORATED ASSOCIATION

Names & Titles of Corporate Board Members

(Also list Names & Titles of persons with written authorization/resolution to sign contracts)

| Names | Title | Contact |
|----------------------|------------------------------|-------------------------------|
| Catherine Ballowe | Board Vice Chair/ Treasurer | catherineb@standupforkids.org |
| Sidney Djité | Finance Chair | sidneyd@standupforkids.org |
| Kelly Fields | Board Secretary | lamas@lafayettesquare.com |
| Fernando Lamas | Member | lamas@lafayettesquare.com |
| Tim McCormick | Member | tmccormick@corovan.com |
| Maggie McWhorter | Member | |
| | mmcworter@standupforkids.org | |
| Bonnie O'Hara | Marketing Chair | bonnieo@standupforkids.org |
| Kim Sisson | Member | kims@@standupforkids.org |
| Kedric Sledge, ED. S | Member | sledgek@fultonschools.org |
| Mark Stevens | Member | marks@standupforkids.org |
| Maria Verastegui | Board Chair | mariav@standupforkids.org |

Federal Tax Identification Number: [REDACTED]

City of Costa Mesa Business License Number:
58166

(If none, you must obtain a Costa Mesa Business License upon award of contract.)

City of Costa Mesa Business License Expiration
Date:

1/31/2024

EX PARTE COMMUNICATIONS CERTIFICATION

Please indicate by signing below one of the following two statements. **Only sign one statement.**

I certify that Proposer and Proposer's representatives have not had any communication with a City Councilmember concerning informal **RFP No. 23-15 HOUSING REALTED SUPPORTIVE SERVICES FOR QUALIFYING POPULATIONS** at any time after **March 27, 2023**.



Date: 4/10/2023_____

Signature

Justine Palmore

Print

OR

I certify that Proposer and Proposer's representatives have communicated after March 27, 2023 with a City Councilmember concerning informal **RFP No. 23-15 HOUSING REALTED SUPPORTIVE SERVICES FOR QUALIFYING POPULATIONS**. A copy of all such communications is attached to this form for public distribution.

Date:

Signature

Print

DISQUALIFICATION QUESTIONNAIRE

The Contractor shall complete the following questionnaire:

Has the Contractor, any officer of the Contractor, or any employee of the Contractor who has proprietary interest in the Contractor, ever been disqualified, removed, or otherwise prevented from bidding on, or completing a federal, state, or local government project because of a violation of law or safety regulation?

Yes ____ No X__

If the answer is yes, explain the circumstances in the following space.

DISCLOSURE OF GOVERNMENT POSITIONS

Each Proposer shall disclose below whether any owner or employee of Contractor currently hold positions as elected or appointed officials, directors, officers, or employees of a governmental entity or held such positions in the past twelve months. List below or state "None."

NONE

COMPANY PROFILE & REFERENCES

Company Legal Name: StandUp for Kids

Company Legal Status (corporation, partnership, sole proprietor etc.): Corporation

Active licenses issued by the California State Contractor's License Board: None

Business Address: P.O. Box 14398 Irvine, CA 92623
1055 El Camino Dr. Ste. E, Costa Mesa, CA 92626

Website Address: <https://www.standupforkids.org/orangecounty>

Telephone Number: 714-356-5437

Email Address: orangecounty@standupforkids.org

Length of time the firm has been in business: 33 years

Length of time at current location: 20 years

Facsimile Number:

Is your firm a sole proprietorship doing business under a different name: ☐ Yes ☒ No

If yes, please indicate sole proprietor's name and the name you are doing business under:

Federal Taxpayer ID Number: [REDACTED]

Regular Business Hours: M-F 9AM - 5PM

Regular holidays and hours when business is closed: Federal Holidays

Contact person in reference to this solicitation:
Justine Palmore

Contact person for accounts payable:
Justine Palmore

Telephone Number: 714-356-5437

Email Address: justines@standupforkids.org

Name of Project Manager: Denise Zermeno

Telephone Number: 714-356-5437

Email Address: denisez@standupforkids.org

COMPANY PROFILE & REFERENCES (Continued)

Submit the company names, addresses, telephone numbers, email, contact names, and brief contract descriptions of at least three clients, preferably other municipalities for whom comparable projects have been completed or submit letters from your references which include the requested information.

Company Name: City of Garden Grove, Community and Economic Development Department

Telephone Number: (714) 741-5144

Contact Name: Timothy Throne, MPA (Sr. Program Specialist)

Contract Amount: \$102,303.00

Email: timothyt@ggcity.org

Address: 11222 Acacia Pkwy, Garden Grove, CA 92840

Brief Contract Description: ESG Rapid Rehousing and Street Outreach

Company Name: City of Anaheim Housing and Community Development

Telephone Number: (714) 765-4318

Contact Name: Michelle Gallardo (Project Manager); Eric Chavira (Management Assistant)

Contract Amount: \$68,796.00 (2021-2023) \$33,000 (2020-2021)

Email: mgallardo@anaheim.net echavira@anaheim.net

Address: 201 S. Anaheim Blvd. Suite 1003 Anaheim, CA 92805

Brief Contract Description: ESG Rapid Rehousing

Company Name: City of Irvine Community Development Department

Telephone Number: 909-476-9696 x 115

Contact Name: Clint Whited

Contract Amount: \$59,932.00

Email: cwhited@cityofirvine.org

Address: 1 Civic Center Plaza P.O. Box 19575 Irvine, California 92623

Brief Contract Description: Street Outreach and Apartment Support

Company Name: City of Mission Viejo Community Service Department

Telephone Number: 949-470-8412- direct 949-470-3061- office

Contact Name: Leslie McDonald, MPA

Contract Amount: \$2,500.00

Email: lmcdonald@cityofmissionviejo.org

Address: 200 Civic Center Mission Viejo, CA 92691

Brief Contract Description: Street Outreach

Company Name: City of Huntington Beach Community Development Department

Telephone Number: (714) 374-5316

Contact Name: Charles G. Kovac, Housing Manager

Contract Amount: \$14,652.00

Email: charles.kovac@surfcity-hb.org

Address: 2000 Main Street Huntington Beach, CA 92648

Brief Contract Description: Street Outreach



BIDDER/APPLICANT/CONTRACTOR CAMPAIGN

CONTRIBUTION DISCLOSURE FORM

Proposer/Consultant/Applicant is required to identify any campaign contribution or cumulative contributions greater than \$249 to any city council member in the twelve months prior to submitting an application, proposal, statement of qualifications or bid requiring approval by the City Council.

| Date | Name of Donor | Company/Business Affiliation | Name of Recipient | Amount |
|------|---------------|------------------------------|-------------------|--------|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

Except as described above, I/we have not made any campaign contribution in the amount of \$250 or more to any Costa Mesa City Council Member in the twelve months preceding this Application/Proposal.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

A handwritten signature in black ink, appearing to read "Justine Palmore".

StandUp for Kids / Justine Palmore

Bidder/Applicant/Proposer

4/10/2023

Date