



Sunnyvale

Amanda Sztoltz
 Housing Division
 456 W Olive Ave
 Sunnyvale, CA 94087
 Phone: (408) 730-7465
 Email: asztoltz@sunnyvale.ca.gov

[Return to Main Page](#)

Capital and Affordable Housing Projects Funding Application
City of Sunnyvale
FY 2026/2027
Community Development Block Grant (CDBG)
Due by 4:30 PM, Feb 9 2026

- [Capital Project RFP](#)

Applicant Information

Legal Name of Organization:	Rebuilding Together Silicon Valley		
Mailing Address:	1801 South 7th Street, #10	City: San Jose, CA	Zip: 95112-6000
Website:	www.rebuildingtogethersv.org		
Contact Person:	Deanne Everton	Title:	Executive Director
Contact Email:	deanne@rtsv.org	Telephone:	4085789519
Executive Director:	Deanne Everton	Email:	deanne@rtsv.org
Agency Type:	Non-Profit with 501(c)(3) Status		
SAM Number:	DZNR E5MR NHY7 (Get a SAM/UEI #)		

PROGRAM OVERVIEW

Project Name:	Repair and Accessibility Modification Services for Low-Income Homeowners		
Project Address:	1701 South 7th Street, #10	City: San Jose	Zip: 95112

Select an Application:

- Capital and Affordable Housing Projects Funding

Please select an application type to proceed with your application

Loan Request

Requested Amount	\$200,000
Other Funding Sources	\$35,000
Total Project Cost	\$235,000
Percentage of City of Sunnyvale funds toward Total Project Cost	85%

Brief Project Description:

We believe that everyone deserves to live in a safe and healthy home. This project will provide owner-occupied housing rehabilitation for 13 low-income Sunnyvale homeowners, meeting HUD's Low- and Moderate-Income (LMI) Housing National Objective.

The program will address urgent health and safety needs, accessibility and mobility modifications, minor repairs, and limited rehabilitation necessary to bring homes into safe, decent, and sanitary condition. Eligible repairs may include accessibility improvements, safety upgrades, and critical building systems repairs.

By stabilizing existing owner-occupied homes, this project will preserve affordable housing, support aging in place, and prevent displacement of cost-burdened residents who lack the financial resources to address essential home repairs. All rehabilitation work will

Provide the following information for a **program contact person**, a **financial contact person**, the **person who wrote the application**, and an **authorized contact**. Include attachments of job descriptions and resumes for key staff.

	NAME	TITLE	PHONE	EMAIL
Program Contact Someone who works with the project on a daily basis, and can answer questions	DeLinda Yatskevich	Programs Director	4085789519	delinda@rtsv.org
Finance Contact	Linda Bostwick	Operations Director	4085789519	linda@rtsv.org
Application Contact Person who wrote this application	Michaela Brown	Grant Writer	4085789519	michaela@rtsv.org
Authorized Contact Person authorized to make commitments on behalf of the organization	Deanne Everton	Executive Director	4085789519	deanne@rtsv.org

I certify that the information contained in this application is true and correct, and that it contains no falsifications, misrepresentations, intentional omissions, or concealment of material facts. I further certify that no contracts have been awarded, funds committed, tenants displaced, or construction begun on the proposed project and that none will be done prior to issuance of a release of funds by City of Sunnyvale.

Signature of Authorized Contact Listed Above Deanne Everton	Date: 02/05/2026
Typed Name Deanne Everton	Title Executive Director

SECTION 1: ORGANIZATIONAL CAPACITY AND EXPERIENCE

A. Provide an organizational overview of your agency, including:

- a description of the history and purpose of the organization
- years in operation
- years of direct experience with proposed project type
- staff experience with proposed project type
- federal grant management experience
- CBDO qualifications, if applying for a CBDO activity (See CFR 570.204)

Our mission is repairing homes, revitalizing communities, rebuilding lives, and our vision is safe homes and communities for everyone. We provide repairs and accessibility modifications for low-income residents in Santa Clara County, including older adults, individuals living with disabilities, and veterans. These services are provided at no cost to the people we help and are tailored to the needs of each homeowner. We also provide facility maintenance and repairs for nonprofit organizations so they can dedicate their time and resources to helping those in need in our community.

Since our founding in 1991, Rebuilding Together Silicon Valley has mobilized more than 44,000 local volunteers who have repaired and transformed over 5,900 homes and community facilities. In 2024, we engaged 1,116 volunteers who gave 10,990 hours of their time to complete 1,826 health and safety repairs at 256 Santa Clara County homes and two nonprofit facilities.

Our Repair and Accessibility Modification Program will leverage our Repair Technician staff, vast network of volunteers, and skilled trade sub-contractors to provide the repairs and accessibility modifications for low-income residents in Sunnyvale to live independently in safe, warm, dry, and affordable housing. Typically, we host two Rebuilding Days each year in April and October to complete repair projects that are scaled and suited to volunteer engagement. These projects leverage community dollars and the experience and willingness of our staff and volunteers to positively impact the health and safety of area residents. These are projects that we have determined involve less urgent repairs and a greater depth of maintenance activities. Typical projects involve exterior painting, stair repairs, deck and porch repairs, debris removal and deferred maintenance repair work. In a typical year, over 2,000 volunteers partner with us, giving of their time and hard work to revitalize and renew Santa Clara County homes and neighborhoods. We typically provide repairs to 25-40 homes across Santa Clara County through our Rebuilding Days.

B. Previous experience using federal funds:

1. Does your organization have previous experience with capital projects involving federal funds? Yes No

2. How many years of previous experience do you have with federally funded projects? **21**

Briefly describe your experience below and how the projects were similar to the one proposed. List up to three projects.

We have local CDBG Housing Repair grants with the City of San Jose, City of Cupertino, City of Milpitas, City of Gilroy, City of Santa Clara, and County of Santa Clara. We have been awarded \$26.3 million in CDBG funding in these cities to date, consistently meeting program goals and repairing more than 5,400 homes.

For example, in FY2024-2025:

- We utilized \$179,942 in CDBG funding from the City of Gilroy to provide repairs for 15 low-income households.
- We utilized \$156,000 in CDBG funding from the City of Milpitas to provide repairs for 16 low-income households.

3. If you have previous experience with federal projects,

was your organization ever required to pay back funds, or found to have violated regulations, etc? Yes No

C. Previous Experience with City-funded projects

1. Do you have previous experience with City-funded projects? ? (Sunnyvale and other Cities) Yes No

Please describe when, what type of funding, and project details if similar to proposed project. List up to three projects.

We have local CDBG Housing Repair grants with the City of San Jose, City of Cupertino, City of Milpitas, City of Gilroy, City of Santa Clara, and County of Santa Clara. We have been awarded \$26.3 million in CDBG funding in these cities to date, consistently meeting program goals and repairing more than 5,400 homes.

For example, in FY2024-2025:

- We utilized \$179,942 in CDBG funding from the City of Gilroy to provide repairs for 15 low-income households.
- We utilized \$156,000 in CDBG funding from the City of Milpitas to provide repairs for 16 low-income households.

2. If you are a prior recipient of City of Sunnyvale HUD funds, what was the date of your last City of Sunnyvale monitoring visit?

3. Were there any findings and/or concerns identified during your last monitoring visit by the City? Yes No

D. Complete the table below for each current member of the applicant's Board of Directors. If your organization does not have a board of directors (e.g., governmental entity), include this page and an explanation of why this form is not applicable (NOTE: Font, margins, or table may be modified to fit information on one page, as long as information below is included.) Identify board office held as applicable.

How many Board Member rows are needed? 15

Board Member/Executive Name	Employer (if any)	Office Held on Board	Term Start Date/Hire Date	Length of Service (years)
Denis Fastert	Pleasant Holidays	Director	July 2022	4
Charissa Gant	Gant C&C	Director	July 2025	1
Jim Kabel	Next Stage Design + Build	Director	July 2025	1
Terry Keisic	Applied Materials	Chair	July 2022	4
T Lamour	Hitachi Vantara, Retired	Vice Chair	July 2024	2
Robert Magana	Heritage Bank of Commerce	Treasurer	July 2024	2
Mirella Maldonado	Hispanic Foundation of Silicon Valley	Secretary	July 2024	2
Maureen Mellon	Mellon Consulting	Director	July 2025	1
Ed Millan	Aledade.com	Director	July 2024	2
Ryan Monger	Adobe Systems	Director	July 2021	5
Liz Murillo	Edward Jones	Director	July 2024	2
Mick Penn	Swinerton	Director	July 2022	4
Adam Ramirez	Pivotal	Director	July 2023	3
Susan Stenman	Prosthetic Solutions	Director	July 2024	2
Matt Vanderwerf	The Health Trust	Director	July 2025	1

E. List any applicable professional credentials/certifications held by the agency or its employees that signify expertise beneficial to complete projects. Items related to affordable housing development, project management, or similar subjects appropriate.

How many rows are needed? 4

Certification/Credential Name	Agency or Employee Name	Year Achieved	Need to Renew?	Describe Relevancy
California Contractors License, Class B	Deanne Everton	2017	Renew annually	Needed for the work we do.
Executive Certificate for Home Modifications, USC School of Gerontology	Deanne Everton	2015	No	Provided useful information on assessing for home modifications and how to work with aging clients
Certified Aging in Place Specialist	Christian Cravens, assessor	2022	No	Provided useful information on assessing for home modifications and how to work with aging clients
Occupational Therapist	Yvonne Golembeski, assessor	2014	No	Provided useful information on assessing for home modifications and how to work with aging clients

SECTION 2: EVIDENCE OF NEED FOR PROJECT

Complete this section accurately and completely.

Part 1 - Priority Activities

Program Priorities/Goals: Identify one or more Consolidated Plan goals the proposed project will address and explain how it will address these goals in Part 3 below.

For additional information, refer to the [Sunnyvale Consolidated Plan](#).

- Goal A: Affordable Housing
- Goal B: Alleviation of Homelessness
- Goal C: Other Community Development Efforts
- Goal D: Expanding Economic Opportunities

Part 2 - National Objective and Beneficiaries

A. Identify the method of determining the eligibility of your project, and **provide an explanation in the box below**. See page 2 of this RFP for definitions of these methods. For all affordable housing projects, you must select Limited Clientele.

1. Method of determining eligibility.

- Area Benefit
- Limited Clientele
- Activity Job Creation

Our target population is low-income homeowners who require safety repairs and accessibility modifications in order for their homes to be safe, decent, and affordable. All of the clients served will have a household income at or below 80% of the Area Median Income as determined by the U.S. Department of Housing and Urban Development.

We identify applicants through outreach, including visiting senior centers and community centers, and often find that word of mouth testimonials from past clients lead to applications from neighbors and peers. Our staff conduct a telephone interview, determine financial eligibility, and schedule a site visit to determine client needs and process for repair completion. The focus of interviews and visits is to evaluate the financial and repair needs of the client and the impact the proposed activity will have on the client's safety, warmth and independence. Once a client has been approved for the program, they must submit proof of ownership and income verification (accepted documentation includes Social Security benefits statements, most recent tax return, or recent pay stubs) before repairs can be made. We use the U.S. Department of Housing and Urban Development's income limits and their Part 5 method to determine income eligibility. Once clients are approved for the program and their documentation has been submitted, we maintain their

B. Number of unduplicated Sunnyvale households (or individuals) to be served by the proposed capital project:

Total number of unduplicated households served	Number of unduplicated lower-income households to be served	Percentage of lower-income households served
13	13	100%

Part 3 - Demonstrated Need for Project

In the space below, provide a brief summary of **current** statistical data documenting the need for your proposed capital project. Include local Sunnyvale data as well as any relevant statistics collected by applicant. Provide sources for the information. Briefly explain the target population for the project, including demographics, and a typical client profile. Explain how your projects design will meet the needs you have described, and how it will achieve the Consolidated Plan goals you identified in Section 2, Part 1.

Summary of Need: Sunnyvale faces significant housing-related challenges that disproportionately impact low-income homeowners, particularly older adults and people with disabilities. Demand for housing rehabilitation and accessibility assistance is high: 15 Sunnyvale applicants are currently in our queue, with an additional 15 households having requested applications, indicating immediate unmet need for home repair and modification services (Source: Rebuilding Together Silicon Valley's applicant information).

Demographic and housing data further underscore this need. Approximately 16.3% of Sunnyvale residents are age 62 or older, a population that is expected to continue growing (Source: U.S. Census Bureau, American Community Survey). At the same time, 55% of the City's housing stock was built before 1979, increasing the likelihood of deferred maintenance, outdated building systems, and home safety hazards (Source: U.S. Census Bureau, ACS). Sunnyvale's homeownership rate is 43.8%, and many homeowners struggle to maintain their homes due to high housing costs. 30.9% of homeowners with a mortgage and 21.6% of homeowners without a mortgage are cost-burdened, paying more than 30% of their income toward housing costs (Source: U.S. Census Bureau, ACS). Additionally, 4.3% of Sunnyvale residents are living with a disability, further increasing the need for accessibility modifications within the home (Source: U.S. Census Bureau, ACS).

The shortage of affordable housing options for older adults makes aging in place a critical housing strategy. According to the Centers for Disease Control and Prevention, falls are the leading cause of injury among older adults, and many falls are directly linked to preventable hazards within the home (Source: CDC, Injury Prevention & Control). Simple home modifications - such as reducing tripping hazards, installing grab bars, adding stair railings, and improving lighting - have been shown to significantly reduce fall risk and help older adults remain safely in their homes.

Target Population and Typical Client Profile: The target population for this project is low-income, owner-occupied households earning at or below 80% of Area Median Income (AMI), as defined by HUD, with a focus on low-income older adults, individuals living with disabilities, and families with children who are facing cost burdens that prevent them from addressing critical home repairs.

A typical client is a senior homeowner living on a fixed income in an older home that requires safety repairs or accessibility upgrades they cannot afford. Many clients have lived in their homes for decades, have limited savings, and are at risk of injury or displacement if home conditions are not addressed.

Project Design and Alignment with Consolidated Plan Goals: The proposed capital project will provide critical safety repairs and accessibility modifications that directly respond to the needs identified above. All work is provided as a grant at no cost to the clients to

Part 4 - Matching Funds

A. List the funding from other sources for this capital project in the following table. Add additional rows to the table if necessary.

How many Other Funding Source rows are needed? 1

Funding Source	Description	Amount	Status as of Dec. 1, 2025 (Committed/Pending)	Award Date
HCD CalHome		\$35,000	Approved	07/01/2025
Total		\$35,000		

*If you have not received an official, legally binding loan commitment or other award letter by the time you submit this application, do not enter "approved". In-Kind donations of services, materials or labor are defined as a nonfinancial donation, typically of goods or services offered free or at less than the usual charge. Examples include pro-bono legal services, consulting services, web design services, donated canned goods, clothing or backpacks, school supplies, or auction items.

B. **FOR DEVELOPMENT PROJECTS ONLY** Identify commitments for ongoing operating funding *for this facility/site only* in the space provided below, and attach all **letters of commitment**.

- All letters must be on the organizations letterhead and must include date, amount of match/leverage, and an authorized signature.
- Letters must be dated within 30 days of the application submission date.
- Letters must demonstrate that the funding is applicable to the project proposed in this application.
- Do not include letters of support, only letters making a firm financial commitment to the project.
- If the project will require formal approval of senior lienholders on the subject property, provide their letters of approval as attachments along with the letters of commitment.

SECTION 3: STATEMENT OF WORK/PROJECT SCOPE

Part 1 - Project Location and Service Area

Provide the street address and assessors parcel number(s) of the project location (**For development projects only**). Attach a map of the project location and the project service area (**for community facility proposals only**), showing zip codes and census tracts in the Attachments section (**for all other project types**).

We have not yet selected projects; however, all projects will take place in the City of Sunnyvale and will serve low-income households.

Part 2 - Project Readiness

A. Work Plan / Project Readiness

Explain your project's work plan, including the activities you will undertake to achieve the project's goal. Include the following:

- Client Recruitment/program marketing plan (for new/expanded facilities or housing)
- Project evaluation plan

For Limited Clientele Facilities, describe your procedures for recruitment, a marketing plan for clients and/or volunteers, and intake and eligibility screening forms.

Client Recruitment/Marketing: We conduct extensive outreach with a focus on ensuring that our services are accessible to those in need. We collaborate with other housing and senior service providers, and we are a member of the Aging Services Collaborative, Santa Clara County Seniors Agenda and Senior Roundtable. We also coordinate outreach with other social service providers to ensure potential clients and referral staff are aware of our program. Applicant outreach includes visiting senior centers, mobile home parks, and community centers, and word of mouth referrals from past clients to their neighbors and peers. We place ads in community newspapers and faith organization bulletins.

We provide accommodations for all those applicants who require additional assistance to apply. As stated on our outreach materials "To request accommodation or alternate format to participate please call 408-578-9519 TTY/TDD Dial 711." We provide materials in four languages (English, Vietnamese, Chinese, and Spanish) to ensure our message is accessible to all community members, and our website offers translation capabilities to further support language accessibility. We have staff who are fluent in Vietnamese and Spanish.

Our staff conduct a telephone interview, determine financial eligibility, and schedule a site visit to determine client needs and process for repair completion. The focus of interviews and visits is to evaluate the financial and repair needs of the client and the impact the proposed activity will have on the client's safety, warmth and independence. Once a client has been approved for the program, they must submit proof of ownership and income verification (accepted documentation includes Social Security benefits statements, most recent tax return, or recent pay stubs) before repairs can be made. We use HUD's income limits and their Part 5 method to determine income eligibility. Once clients are approved for the program and their documentation has been submitted, we maintain their information and application in our customized and secure Salesforce database to ensure accurate tracking of all clients.

B. Based on the table above, Please describe the program's cost-effective design and program delivery:

The program is designed to maximize CDBG impact through leveraged funding, efficient project delivery, and strategic use of volunteer labor. In addition to requested CDBG funds, the project will leverage \$35,000 in committed non-CDBG funding, reducing the per-unit cost of rehabilitation while allowing the program to serve more low-income homeowners.

Projects are limited to critical health and safety repairs, accessibility modifications, and limited rehabilitation, ensuring that funds are focused on essential, high-impact improvements rather than full-scale renovations. Each home is assessed using a standardized scope of work to prioritize urgent needs and prevent cost overruns.

The program also incorporates skilled and supervised volunteer labor, where appropriate, to complete select repairs and installations. Volunteer participation lowers labor costs, stretches available resources, and allows paid contractors to focus on work requiring licensed trades.

C. Implementation Schedule

Milestone	Target Date
1. Contract Start Date	07/01/2026
2. Design and Permitting (development projects only)	
3. Initiation of Project	07/01/2026
4. Completion of Project	06/30/2027
5. 50% of Funds Expended and Drawn	02/28/2027
6. 100% of Funds Expended and Drawn	06/30/2027
7. Project Close Out and Reporting	07/31/2027

D. Performance Measurement System: Complete the following tables with information about the objectives and outcomes of your proposed project.

How many rows needed? 2

1. CDBG/HOME OBJECTIVE	2. CDBG/HOME OUTCOME
Providing Decent Housing	Affordability
Providing Decent Housing	Availability/Accessibility

E. Client Data: Identify the number of households your project will serve, in the following categories:

Type of Household	Residing in Sunnyvale	Residing outside of Sunnyvale	Total
Extremely Low Income (0%-30% AMI)	7	143	150
Very Low Income (<50% AMI)	6	56	62
Low Income (50%-80% AMI)		38	38
Moderate Income (81%-120% AMI)			0
Above Moderate Income (120%+ AMI)			0
total	13	237	250
Youth (0-18 years)	4	40	44
Seniors (62+ years)	18	194	212
Disabled Persons	7	71	78

Female-Headed Households	6	65	71
Homeless Persons			0
Other Special Needs			0
total	35	370	405

Part 3 - Construction Project Description

***** SKIP PART 3 ENTIRELY IF NOT A DEVELOPMENT PROJECT *****

A. Does your project involve:

- Acquisition? Yes No
 New construction? Yes No
 Major rehabilitation? Yes No
 Minor rehabilitation? Yes No

**Major rehabilitation* is defined as rehabilitation work that costs more than 25 percent of the value of the building before rehabilitation. The value of the building means the monetary value assigned to a building by a recent appraisal and/or property tax assessment, or replacement cost.

B. Do you have site control, including any right-of-way, easements, or encroachment permits needed for the project? Yes No
 Explain how you intend to secure site control prior to the start of this project. Include the anticipated acquisition date(s).

Not applicable

C. Operating Funds:

For construction, expansion or acquisition of a community facility, will you have sufficient funds available for the operations of the facility? Yes No

If applicable, attach a pro-forma with detailed information about operating funds available for the facility for at least 15 years and include as an attachment.

D. Will your project involve temporary (less than 1 year) or permanent (more than 1 year) relocation of tenants from your proposed project site (residential or commercial tenants)? Yes: Temporary Yes: Permanent No Relocation Needed

If you answered yes to either type of relocation, please attach a URA-compliant relocation plan in attachments.

E. If applicable, Provide the following property information:

- Property Description, including amenities and features
- Property Condition/Inspection Results
- Appraisal: Provide most recent appraised value.
- Unit Inspection Summary (for rehabilitation/expansion projects)
- List of Property Improvements

Not applicable

F. If applicable, Attach the following items as attachments to this application

- Property Survey or Assessors Parcel Map
- Proposed Site Plan and/or Architectural Elevations
- Infrastructure Plans, if needed
- Environmental Review (see form in Standard Forms)

SECTION 4: PROJECT BUDGET AND FINANCIAL INFORMATION

Part 1 - Budget Information

Provide a narrative explaining the total project budget, including major budget line items in the order in which they are listed on the budget form. Explain, using data if necessary, why cost estimates are realistic.

Sunnyvale CDBG:
 Staffing costs of project delivery = \$50,000
 Direct costs (materials and paid sub-contractors) = \$130,435
 Indirect = \$19,565

Part 2 - Financial Information

A. Describe the organization's financial management practices, including:

- financial reporting,
- record keeping,
- accounting systems,
- payment procedures

Our organization maintains strong financial management practices that ensure accountability, compliance, and effective delivery of CDBG-funded services. These practices include robust financial reporting, record keeping, accounting systems, and payment procedures.

Financial Reporting and Accounting Systems: We utilize QuickBooks for accounting and Salesforce, a secure, cloud-based database, to track client data, project scopes, expenses, contractor payments, and funding sources. Each funding source, including CDBG, is assigned a unique general ledger code, allowing funds to be fully segregated and tracked in accordance with grant requirements. All transactions are reconciled and coded by the Operations Director, with monthly financial reports reviewed by the Executive Director and presented to the Board of Directors for oversight. We follow GAAP and federal grant compliance guidelines.

Payment Procedures: All project scopes and changes are reviewed and approved by the Program Director prior to expenditures. Subcontractors are procured in accordance with required procedures, and payments are not issued until work has been completed, inspected, and approved, with homeowner sign-off confirming satisfactory completion. The Operations Director processes all payables only after proper documentation is received, including invoices and verification of completed work.

Record Keeping and Documentation: Project records are maintained electronically in Salesforce and include scopes of work,

[Save and Continue](#)

B. Budget for Fiscal Year 26-27

Provide an itemized budget, including each position included in the project, and all non-personnel operating costs. If budget includes Indirect Costs, HUD allows a de minimis rate of up to 15%.

Budget Line Item	% FTE Funded	Position Title	Sunnyvale	Other Funds	Program Total
Personnel					
175500	4%	Executive Director	\$7,020		\$7,020
93500	6%	Programs Director	\$5,610		\$5,610
103500	6%	Operations Director	\$6,210		\$6,210
81000	5%	Operations & Salesforce Admin	\$4,050		\$4,050
90000	5%	Community Engagement Program Manager	\$4,500		\$4,500
65500	5%	Volunteer Coordinator	\$3,275		\$3,275
61360	6%	Construction Services Associate	\$3,325		\$3,325
70500	5%	Marketing Specialist	\$3,525		\$3,525
80000	5%	Home Repair Technician	\$4,000		\$4,000
86000	6%	Client Services Coordinator and Client Services Manager (2 positions)	\$8,485		\$8,485
Personnel Benefits					\$0
Non-Personnel					
Lease of Property					\$0
Building Maintenance Supplies and Repair					\$0
Staff Training					\$0
Staff Travel-(Local & Out of Town)					\$0
Rental of Equipment					\$0
IT Equipment					\$0
Program Supplies			\$130,435	\$30,435	\$160,870
Client Assistance					\$0
Consultants					\$0
Indirect Costs (15% of all other costs)			\$19,565	\$4,565	\$24,130
TOTAL			\$200,000	\$35,000	\$235,000

[Save and Continue](#)

C. Financial Ratios

Please provide the financial information below to calculate the required ratios.

	Ratio #1 - Current Ratio	Ratio #2 - Debt Ratio	Ratio #3 - Program Expense Ratio
1	Current Assets \$2,172,225	Total Liabilities \$468,024	Program Services Expenses \$3,141,709

2	Current Liabilities \$208,167	Total Assets \$2,516,305	Total Expenses \$3,873,263
	Current Ratio (1/2) 10.44	Debt Ratio (1/2) 0.19	Program Exp Ratio (1/2) 0.81

Attachments

(Upload Instructions)

Please provide supporting document attachments below. Several attachments are REQUIRED by all applicants in order to submit your application, and your application WILL NOT be able to be submitted with missing attachments! There are several additional attachments that are REQUIRED depending on if the project is related to developing affordable housing. Please take this into consideration when timing your submission of this application. The documents you need to upload are checked below. If you have other attachments you would like to include, please check one of the Other boxes below and identify the Attachment in the box. If you are unable to upload any of the attachments, contact the CDBG Manager of the appropriate jurisdiction at least one day prior to submitting your application.

- Pro-forma "For development projects only"
- Project Service Area Map
- Project-Specific Organizational Chart [RTSV_Org_Chart_2026.pdf](#)
- Agency-Wide Organizational Chart [RTSV_Org_Chart_2026.pdf](#)
- Signature Authorization - [Download, Complete, and Upload](#) [RTSV_Sunnyvale_Authorization_Form.pdf](#)
- Conflict of Interest Disclosure - [Download, Complete, and Upload](#) [RTSV_Sunnyvale_Conflict_of_Interest.pdf](#)
- Environmental Review Form "For development projects only" - [Download, Complete, and Upload](#)
- CHDO or CBDO Verification
- Bylaws [RTSV_Current_Bylaws_Approved_6_15_16.pdf](#)
- Articles of Incorporation [RTSV_Articles_of_Incorporation.pdf](#)
- 501(c) (3) documentation from IRS (if applicable) [RTSV_IRS_Letter.pdf](#)
- Financial Statements (1 year prior) [RTSV_990_Public_Disclosure_FY2024.pdf](#)
- Financial Statements (2 years prior) [RTSV_990_2023.pdf](#)
- Financial Statements (3 years prior) [RTSV_2022_990.pdf](#)
- Financial Audit (1 year prior) [RTSV_2025_Audit.pdf](#)
- Financial Audit (2 years prior) [RTSV_Audit_2024.pdf](#)
- Letters of Commitment "For development projects only" [Habitat_Services_Agreement_SCC_-_FY26.docx.pdf](#)
- Board Resolution authorizing submittal of proposal [RTSV_Authorization_to_Submit_Proposal_2026.pdf](#)
- Language Access Plan and (ADA) Accessibility Policy [RTSV_LEP_and_Accessibility_Statement.docx](#)
- Job Descriptions and Resumes [RTSV_Leadership_Team_2026.docx](#)
- Appraisal of Property "For development projects only"
- Environmental Site Assessment "For development projects only"
- Parcel Map "For development projects only"
- Property Listing "For development projects only"
- Relocation Plan (if project anticipates displacement) "For development projects only"
- Letters of Community Support "For development projects only"
- Architectural Drawings/Plans "For development projects only"
- Other - [RTSV_Client_Application_2026.pdf](#)
- Other -

(Your application will be saved)

Application Submitted by: Deanne Everton Date: 02/06/2026

Reviewed and accepted by City of Sunnyvale:
Sign Here:
Accepted status

Click above to return application to



Sunnyvale

Amanda Sztoltz
 Housing Division
 456 W Olive Ave
 Sunnyvale, CA 94087
 Phone: (408) 730-7465
 Email: asztoltz@sunnyvale.ca.gov

[Return to Main Page](#)

Capital and Affordable Housing Projects Funding Application
City of Sunnyvale
FY 2026/2027
Community Development Block Grant (CDBG)
Due by 4:30 PM, Feb 9 2026

- [Capital Project RFP](#)

Applicant Information

Legal Name of Organization:	Upwards Care, Inc		
Mailing Address:	5521 N University Drive, Suite 104	City: Sunnyvale, CA	Zip: 33067-4648
Website:	https://upwards.com/		
Contact Person:	Melanie Faure	Title:	Community Impact Manager
Contact Email:	melanie@upwards.com	Telephone:	2134003438
Executive Director:	Jessica Chang	Email:	jessica@upwards.com
Agency Type:	Other Type of Organization Describe: for-profit social enterprise		
SAM Number:	HRBLHQGMG4T5 (Get a SAM/UEI #)		

PROGRAM OVERVIEW

Project Name:	Boost		
Project Address:	13 in-home childcare providers within Sunnyvale City Limits	City: Sunnyvale	Zip: 94043

Select an Application:

- Capital and Affordable Housing Projects Funding

Please select an application type to proceed with your application

Loan Request

Requested Amount	\$119,600
Other Funding Sources	\$85,303
Total Project Cost	\$204,903
Percentage of City of Sunnyvale funds toward Total Project Cost	58%

Brief Project Description:

The Boost program equips low-to-moderate-income family child care providers with personalized coaching and digital tools to optimize operations and revenue. This allows them to efficiently manage and expand their small businesses, creating quality local jobs and expanding access to affordable, quality care for the working families in the community.

Provide the following information for a **program contact person**, a **financial contact person**, the **person who wrote the application**, and an **authorized contact**. Include attachments of job descriptions and resumes for key staff.

	NAME	TITLE	PHONE	EMAIL
Program Contact Someone who works with the project on a daily basis, and can answer questions	Starlynn Perez	Boost Program Manager	310-695-6851	starlynn@upwards.com
Finance Contact	Dylan Melnick	Billing Manager	310-695-5920	dylan@upwards.com
Application Contact Person who wrote this application	Melanie Faure	Community Impact Manager	213-400-3438	melanie@upwards.com
Authorized Contact Person authorized to make commitments on behalf of the organization	Melanie Faure	Community Impact Manager	213-400-3438	melanie@upwards.com

I certify that the information contained in this application is true and correct, and that it contains no falsifications, misrepresentations, intentional omissions, or concealment of material facts. I further certify that no contracts have been awarded, funds committed, tenants displaced, or construction begun on the proposed project and that none will be done prior to issuance of a release of funds by City of Sunnyvale.

Signature of Authorized Contact Listed Above Melanie Faure	Date: 02/04/2026
Typed Name Melanie Faure	Title Community Impact Manager

SECTION 1: ORGANIZATIONAL CAPACITY AND EXPERIENCE

A. Provide an organizational overview of your agency, including:

- a description of the history and purpose of the organization
- years in operation
- years of direct experience with proposed project type
- staff experience with proposed project type
- federal grant management experience
- CBDO qualifications, if applying for a CBDO activity (See CFR 570.204)

History and Purpose: Founded in 2017, Upwards is the largest network of licensed home-based childcare providers in the United States. Our mission is to solve care for good by creating a system where every family can find reliable childcare and every provider can build a sustainable business. We are a technology-driven childcare marketplace that connects families, providers, employers, and municipalities to expand access to quality, affordable childcare. Upwards believes that lasting change happens when stakeholders—childcare providers, families, businesses, and government leaders—work together to build a stronger, more equitable childcare system. By supporting childcare providers, we help strengthen local economies while improving housing stability, job security, and workforce participation for families.

Direct Experience with Proposed Project Type: Upwards launched our flagship Boost program in 2022 and has four years of direct experience administering community development block grant programs. With CDBG funding support, we have partnered with more than 30 cities and counties across eight states to implement the Boost program, including communities in California, Colorado, Florida, New York, Oregon, Utah, Washington, and Missouri. Our track record demonstrates consistent success in exceeding program outcomes. In 2024, we partnered with 12 cities to support 220 providers and helped create 129 new jobs—far surpassing all projected outcomes. In 2025, we have expanded to partnerships with 20 cities supporting nearly 400 providers. In San Jose alone, our Boost team supported 133 in-home childcare providers, created 39 new teaching assistant jobs, and assisted over 400 families in just the first five months—once again exceeding all projected outcomes.

Staff Experience with Boost: Our team includes dedicated experts in early childhood education, business operations, and technology solutions specifically tailored to support family childcare providers. Key leadership includes:

Starlynn Perez, Boost Program Manager: Recently promoted from Lead Care Specialist, Perez brings over 15 years of experience in Early Childhood Education, including successfully operating her own daycare. As a Boost program graduate herself, Perez has been with the Upwards Boost team for two years and has personally assisted nearly 500 family childcare providers.

Alex Estrada, Boost Care Specialist: With over 18 years of experience in Early Childhood Education, Estrada holds a Master's degree in Child Development and has a notable 10 year tenure with Head Start. Estrada has been integral to the Boost team for two years, working alongside Perez to deliver exceptional provider support. Both Perez and Estrada's intimate knowledge of the challenges childcare providers face—gained through direct experience in the field—continues to enhance the quality and effectiveness of the Boost program.

Karan Malhotra, Finance Specialist: Karan is a seasoned finance executive with over 10 years of experience in accounting, internal

B. Previous experience using federal funds:

1. Does your organization have previous experience with capital projects involving federal funds? Yes No

2. How many years of previous experience do you have with federally funded projects? **6**

Briefly describe your experience below and how the projects were similar to the one proposed. List up to three projects.

Project 1: CDBG-Funded Boost Program (Local Level) Upwards has successfully administered the CDBG-funded Boost program in partnership with over 30 municipalities across eight states, including 4 communities in Santa Clara County (including Sunnyvale and the County itself). Through Boost, we have consistently demonstrated our capacity to meet federal compliance requirements, exceed program outcomes, and maintain strong relationships with government partners. With each program year, we continue to refine and improve the Boost model by incorporating feedback from providers, families, and municipal partners to ensure maximum effectiveness and community impact.

Project 2: California State Childcare Subsidy Administration (State Level) Upwards is contracted with the State of California to administer childcare subsidies to income-eligible families through funding from the Child Care and Development Block Grant (CCDBG). This project is similar to the proposed work in that it requires rigorous compliance with federal funding regulations, income verification processes, provider network management (FCCHEN), and detailed reporting requirements. Upwards administers similar childcare subsidies to families in Park City and Summit County, Utah, demonstrating our ability to scale subsidy administration programs across different jurisdictions while maintaining regulatory compliance.

Project 3: U.S. Army Reserve Childcare Assistance Program (Federal Level) Upwards currently facilitates childcare tuition payments and matching services for Army and Army National Guard Reservists. This federally funded program shares key similarities with the

3. If you have previous experience with federal projects, was your organization ever required to pay back funds, or found to have violated regulations, etc? Yes No

C. Previous Experience with City-funded projects

1. Do you have previous experience with City-funded projects? ? (Sunnyvale and other Cities) Yes No

Please describe when, what type of funding, and project details if similar to proposed project. List up to three projects.

Upwards has successfully administered the Boost program in partnership with over 30 municipalities across eight states, largely with the support of CDBG funding. Upwards has administered the Boost program in the City of Rancho Cordova with City funding.

2. If you are a prior recipient of City of Sunnyvale HUD funds, what was the date of your last City of Sunnyvale monitoring visit?

3. Were there any findings and/or concerns identified during your last monitoring visit by the City? Yes No

D. Complete the table below for each current member of the applicant's Board of Directors. If your organization does not have a board of directors (e.g., governmental entity), include this page and an explanation of why this form is not applicable (NOTE: Font, margins, or table may be modified to fit information on one page, as long as information below is included.) Identify board office held as applicable.

How many Board Member rows are needed? 4

Board Member/Executive Name	Employer (if any)	Office Held on Board	Term Start Date/Hire Date	Length of Service (years)
Jessica Chang	Upwards	CEO, Treasurer, Secretary	Sept 2017	9
Anna Barber	M13	Member	Feb 2022	4
Nate Redmond	Alpha Edison	Member	Jan 2024	2
Matt Reilly	Upwards	Member (CPO at Upwards)	Sept 2017	9

E. List any applicable professional credentials/certifications held by the agency or its employees that signify expertise beneficial to complete projects. Items related to affordable housing development, project management, or similar subjects appropriate.

How many rows are needed? 2

Certification/Credential Name	Agency or Employee Name	Year Achieved	Need to Renew?	Describe Relevancy
Alex Estrada	Masters, Child Development	2007	No	Estrada
Karan Malhotra	CPA (Certified Public Accountant) and IMA (Institute of Management Accountants)	2014	No	Karan is a seasoned finance executive with over 10 years of experience in accounting, internal controls, and systems management. Karan ensures the fiscal integrity of our operations and oversees efficient reimbursement processes.

SECTION 2: EVIDENCE OF NEED FOR PROJECT

Complete this section accurately and completely.

Part 1 - Priority Activities

Program Priorities/Goals: Identify one or more Consolidated Plan goals the proposed project will address and explain how it will address these goals in Part 3 below.

For additional information, refer to the [Sunnyvale Consolidated Plan](#).

- Goal A: Affordable Housing
- Goal B: Alleviation of Homelessness
- Goal C: Other Community Development Efforts
- Goal D: Expanding Economic Opportunities

Part 2 - National Objective and Beneficiaries

A. Identify the method of determining the eligibility of your project, and **provide an explanation in the box below**. See page 2 of this RFP for definitions of these methods. For all affordable housing projects, you must select Limited Clientele.

1. Method of determining eligibility.

- Area Benefit
- Limited Clientele
- Activity Job Creation

The Boost Program ensures that at least 51% of participants qualify as low- to moderate-income (LMI), as required by HUD's CDBG guidelines. Based on past program data, nearly 100% of participants meet this requirement. Income verification begins with an intake application where participants report their household size and annual income. They first self-certify their income, then submit supporting documents such as W-2 forms, pay stubs, bank statements, or tax returns. Care Specialists review these documents to confirm that participants meet the CDBG income eligibility criteria. If there are discrepancies between self-reported income and submitted documents, participants must provide additional verification or clarifications. This ensures accuracy and compliance with CDBG requirements.

B. Number of unduplicated Sunnyvale households (or individuals) to be served by the proposed capital project:

Total number of unduplicated households served	Number of unduplicated lower-income households to be served	Percentage of lower-income households served
13	13	100%

Part 3 - Demonstrated Need for Project

In the space below, provide a brief summary of **current** statistical data documenting the need for your proposed capital project. Include local Sunnyvale data as well as any relevant statistics collected by applicant. Provide sources for the information. Briefly explain the target population for the project, including demographic, and a typical client profile. Explain how your projects design will meet the needs you have described, and how it will achieve the Consolidated Plan goals you identified in Section 2, Part 1.

Sunnyvale faces a critical childcare shortage: nearly 50% of children under age 6—over 5,000 children—cannot access licensed care, with an even more severe gap for infants and toddlers under age 2 (Source: U.S. Census, California Dept. of Social Services). This estimate is conservative, as licensed providers also serve school-age children up to 13 with before- and after-school care, including supplementing early-dismissal TK programs.

Despite providing this essential service, childcare providers in Sunnyvale earn an average of \$18 per hour (Zippia, 2025), qualifying the majority as low-to-moderate income earners. The Boost Program serves low- and very low-income micro-enterprise owners who operate licensed home-based childcare businesses in Sunnyvale. Many are the sole or primary breadwinners in their households, operating licensed home-based childcare as micro-enterprises in neighborhoods where quality childcare access is most limited.

In our inaugural year, Boost successfully onboarded 8 providers and created 4 Teaching Assistant roles—exceeding our initial goal of 3 ahead of schedule. Demand remains substantial, with over 140 providers on our waitlist. We respectfully request \$119,600 in CDBG funding to support 13 additional providers and create 4 new Teaching Assistant positions.

Part 4 - Matching Funds

A. List the funding from other sources for this capital project in the following table. Add additional rows to the table if necessary.

How many Other Funding Source rows are needed? 2

Funding Source	Description	Amount	Status as of Dec. 1, 2025 (Committed/Pending)	Award Date
Upwards	Non-Personnel: Training Materials (and translations), Equipment, Marketing for Providers, Marketing for Families, Cost of Payments, Technology Costs and Office Supplies.	\$25,456	Approved	04/13/2026

Upwards	Personnel (variable): CD BG funds will be leveraged with Upwards	\$59,847	Pending	04/13/2026
Total		\$85,303		

*If you have not received an official, legally binding loan commitment or other award letter by the time you submit this application, do not enter "approved". In-Kind donations of services, materials or labor are defined as a nonfinancial donation, typically of goods or services offered free or at less than the usual charge. Examples include pro-bono legal services, consulting services, web design services, donated canned goods, clothing or backpacks, school supplies, or auction items.

B. FOR DEVELOPMENT PROJECTS ONLY Identify commitments for ongoing operating funding *for this facility/site only* in the space provided below, and attach all **letters of commitment**.

- All letters must be on the organizations letterhead and must include date, amount of match/leverage, and an authorized signature.
- Letters must be dated within 30 days of the application submission date.
- Letters must demonstrate that the funding is applicable to the project proposed in this application.
- Do not include letters of support, only letters making a firm financial commitment to the project.
- If the project will require formal approval of senior lienholders on the subject property, provide their letters of approval as attachments along with the letters of commitment.

Not Applicable

SECTION 3: STATEMENT OF WORK/PROJECT SCOPE

Part 1 - Project Location and Service Area

Provide the street address and assessors parcel number(s) of the project location (**For development projects only**). Attach a map of the project location and the project service area (for community facility proposals only), showing zip codes and census tracts in the Attachments section (**for all other project types**).

13 in-home childcare providers within Sunnyvale City Limits

Part 2 - Project Readiness

A. Work Plan / Project Readiness

Explain your project's work plan, including the activities you will undertake to achieve the project's goal. Include the following:

- Client Recruitment/program marketing plan (for new/expanded facilities or housing)
- Project evaluation plan

For Limited Clientele Facilities, describe your procedures for recruitment, a marketing plan for clients and/or volunteers, and intake and eligibility screening forms.

Client Recruitment & Marketing Plan: Upwards maintains direct contact with all licensed in-home childcare providers in Sunnyvale via text, phone and email. To reach providers who may not be as digitally connected, our outreach strategy includes social media campaigns, local newspaper advertisements, partnerships with community organizations, and distribution of flyers and brochures to high-traffic community hubs. We will also leverage partnerships with Child Care Resource and Referral agencies to identify and reach eligible providers. As Upwards will have already been actively engaged with Sunnyvale's provider community for a full year, we anticipate this recruitment process will proceed even more efficiently in year two.

Intake & Eligibility Screening: The Boost Program ensures that at least 51% of participants qualify as low- to moderate-income (LMI) per HUD CDBG guidelines. Based on past program data, nearly 100% of participants meet this threshold. Our intake process begins with an application where participants report household size and annual income, followed by submission of supporting documentation such as W-2s, pay stubs, bank statements, or tax returns. Care Specialists review all documents to verify CDBG income eligibility, requesting additional verification if discrepancies arise between self-reported and documented income.

Program Activities: Boost stabilizes and grows childcare microenterprises through three core supports. First, personalized coaching connects providers with Care Specialists who have childcare business experience and provide one-on-one guidance on business strategy, licensing compliance, hiring, budgeting, and marketing. Second, our Childcare Management System (CMS) provides a digital

B. Based on the table above, Please describe the program's cost-effective design and program delivery:

Boost delivers exceptional value by leveraging Upwards' existing infrastructure, technology platforms, and expertise to minimize overhead costs typically associated with standalone programs. The requested \$8,000 per provider CDBG investment is supplemented by Upwards' in-kind contributions covering all non-personnel costs including training materials, equipment, marketing, payment processing, technology, and office supplies—bringing the total support value to \$10,000-\$12,000 per microenterprise annually. This cost-effective model provides 13 childcare providers with year-long intensive support including personalized coaching from experienced Care Specialists, a comprehensive Childcare Management System (which providers retain free after program completion), and practical business training curriculum. The program is free to all participating providers and the families they serve. By building provider capacity and business sustainability, Boost creates lasting community benefits that extend well beyond the program year, ensuring stable access to affordable licensed childcare in Sunnyvale's underserved neighborhoods.

C. Implementation Schedule

Milestone	Target Date
1. Contract Start Date	07/01/2026
2. Design and Permitting (development projects only)	
3. Initiation of Project	07/01/2026
4. Completion of Project	06/30/2027
5. 50% of Funds Expended and Drawn	12/31/2026
6. 100% of Funds Expended and Drawn	06/30/2027
7. Project Close Out and Reporting	06/30/2027

D. Performance Measurement System: Complete the following tables with information about the objectives and outcomes of your proposed project.

How many rows needed? 1

1. CDBG/HOME OBJECTIVE	2. CDBG/HOME OUTCOME
Creating Expanded Economic Opportunity	Sustainability

E. Client Data: Identify the number of households your project will serve, in the following categories:

Type of Household	Residing in Sunnyvale	Residing outside of Sunnyvale	Total
Extremely Low Income (0%-30% AMI)	3	0	3
Very Low Income (<50% AMI)	4	0	4
Low Income (50%-80% AMI)	6	0	6
Moderate Income (81%-120% AMI)	0	0	0
Above Moderate Income (120%+ AMI)	0	0	0
total	13	0	13
Youth (0-18 years)	0	0	0
Seniors (62+ years)	0	0	0
Disabled Persons	0	0	0
Female-Headed Households	13	0	13
Homeless Persons	0	0	0
Other Special Needs	0	0	0
total	13	0	13

Part 3 - Construction Project Description

*** SKIP PART 3 ENTIRELY IF NOT A DEVELOPMENT PROJECT ***

A. Does your project involve:

- Acquisition? Yes No
 New construction? Yes No
 Major rehabilitation? Yes No
 Minor rehabilitation? Yes No

*Major rehabilitation is defined as rehabilitation work that costs more than 25 percent of the value of the building before rehabilitation. The value of the building means the monetary value assigned to a building by a recent appraisal and/or property tax assessment, or replacement cost.

B. Do you have site control, including any right-of-way, easements, or encroachment permits needed for the project? Yes No
 Explain how you intend to secure site control prior to the start of this project. Include the anticipated acquisition date(s).

Not Applicable

C. Operating Funds:

For construction, expansion or acquisition of a community facility, will you have sufficient funds available for the operations of the facility? Yes No

If applicable, attach a pro-forma with detailed information about operating funds available for the facility for at least 15 years and include as an attachment.

D. Will your project involve temporary (less than 1 year) or permanent (more than 1 year) relocation of tenants from your proposed project site (residential or commercial tenants)? Yes: Temporary Yes: Permanent No Relocation Needed

If you answered yes to either type of relocation, please attach a URA-compliant relocation plan in attachments.

E. If applicable, Provide the following property information:

- Property Description, including amenities and features
- Property Condition/Inspection Results
- Appraisal: Provide most recent appraised value.
- Unit Inspection Summary (for rehabilitation/expansion projects)
- List of Property Improvements

F. If applicable, Attach the following items as attachments to this application

- Property Survey or Assessors Parcel Map
- Proposed Site Plan and/or Architectural Elevations
- Infrastructure Plans, if needed
- Environmental Review (see form in Standard Forms)

SECTION 4: PROJECT BUDGET AND FINANCIAL INFORMATION

Part 1 - Budget Information

Provide a narrative explaining the total project budget, including major budget line items in the order in which they are listed on the budget form. Explain, using data if necessary, why cost estimates are realistic.

Personnel Costs (\$119,600 CDBG Request) CDBG funding supports personnel essential to administering and delivering the Boost program, including: Program Director, Provider Care Specialists, Family Care Specialists, Enrollment Specialist, Finance Specialist, Product and Technical Support, Communications Specialist, and Community Engagement Specialist. These staff members develop training materials, conduct workshops, and provide ongoing support to childcare providers and families. The Boost team is supported by Upwards' broader infrastructure of technology, marketing, and finance specialists.

Upwards uses time-tracking software to accurately record and invoice each staff member's program-related hours. All personnel roles are clearly defined, directly related to program delivery, and allowable under HUD's Playing by the Rules Handbook. This allocation demonstrates our commitment to leveraging skilled staff to achieve measurable program outcomes.

In-Kind Match (\$55,356) Upwards' in-kind contributions cover all non-personnel costs (\$25,456) including training materials and translations (\$7176), equipment (\$4784), provider and family marketing (\$6967), payment processing (\$5542), technology platforms (\$748), and office supplies (\$239). *Note: budget table does not allow for customization of non-personnel, so please refer to this section for correct breakdown.

Part 2 - Financial Information

A. Describe the organization's financial management practices, including:

- financial reporting,
- record keeping,
- accounting systems,
- payment procedures

Upwards has a robust financial management system led by a dedicated Finance team under the guidance of the Chief Financial Officer. We have clear processes for tracking, managing, and reporting grant funds to ensure compliance, accuracy, and transparency. Our accounting software maintains accurate records and supports real-time financial analysis. All financial records are securely stored for at least seven years to ensure compliance and audit readiness.

Our Enterprise Resource Planning (ERP) system automates financial processes, including accounts receivable, accounts payable, and reporting. Every expense reimbursement and invoice payment follows documented policies and goes through a multi-step review process to prevent errors and ensure accountability. We produce monthly financial statements to compare budgeted and actual spending, allowing for ongoing oversight.

For grant management, we assign unique cost centers and codes to each budget, allowing precise tracking of expenditures. We follow competitive procurement policies to ensure fairness and transparency when acquiring grant-funded services and goods. Our reporting process is structured and thorough. Grant managers collect program data, while Finance reconciles expenditures to ensure accuracy before submitting reports. We have successfully managed over \$15 million in government contracts since 2021, demonstrating our commitment to fiscal responsibility and compliance with federal regulations.

To ensure proper handling of Community Development Block Grant (CDBG) funds, we separate them from other agency funds using dedicated cost centers, unique General Ledger (GL) codes, and distinct bank accounts. CDBG transactions are recorded separately,

[Save and Continue](#)

B. Budget for Fiscal Year 26-27

Provide an itemized budget, including each position included in the project, and all non-personnel operating costs. If budget includes Indirect Costs, HUD allows a de minimis rate of up to 15%.

Budget Line Item	% FTE Funded	Position Title	Sunnyvale	Other Funds	Program Total
Personnel					
Salary - Positions 1-3	13	Program Director / Managers	\$16,477	\$11,358	\$27,835

Salary - Positions 4-7	14	Technical Assistance	\$24,028	\$15,134	\$39,162
Salary - Positions 8-10	16.5	Outreach	\$19,772	\$9,906	\$32,778
Salary - Positions 11-13	4	Administrative	\$4,737	\$5,489	\$10,226
Salary - Positions 14-16	25	Care & Enrollment Specialist / Managers	\$23,479	\$14,860	\$38,339
Indirect Costs (15%)			\$15,600	\$0	\$15,600
Training Materials, Program Supplies			\$0	\$7,415	\$7,415
Marketing for Providers, Families for Providers			\$0	\$6,967	\$6,967
Cost of Payments			\$0	\$5,542	\$5,542
Equipment, Technology Costs			\$0	\$5,532	\$5,532
Personnel Benefits			\$15,507	\$0	\$15,507
Non-Personnel					
Lease of Property			\$0	\$0	\$0
Building Maintenance Supplies and Repair			\$0	\$0	\$0
Staff Training			\$0	\$0	\$0
Staff Travel-(Local & Out of Town)			\$0	\$0	\$0
Rental of Equipment			\$0	\$0	\$0
IT Equipment			\$0	\$0	\$0
Program Supplies			\$0	\$0	\$0
Client Assistance			\$0	\$0	\$0
Consultants			\$0	\$0	\$0
Indirect Costs (15% of all other costs)			\$0	\$0	\$0
TOTAL			\$119,600	\$85,303	\$204,903

[Save and Continue](#)

C. Financial Ratios

Please provide the financial information below to calculate the required ratios.

	Ratio #1 - Current Ratio	Ratio #2 - Debt Ratio	Ratio #3 - Program Expense Ratio
1	Current Assets \$8,818,203	Total Liabilities \$11,090,517	Program Services Expenses \$5,058,663
2	Current Liabilities \$6,758,270	Total Assets \$6,758,270	Total Expenses \$14,684,378
	Current Ratio (1/2) 1.30	Debt Ratio (1/2) 1.64	Program Exp Ratio (1/2) 0.34

Attachments

(Upload Instructions)

Please provide supporting document attachments below. Several attachments are REQUIRED by all applicants in order to submit your application, and your application WILL NOT be able to be submitted with missing attachments! There are several additional attachments that are REQUIRED depending on if the project is related to developing affordable housing. Please take this into consideration when timing your submission of this application. The documents you need to upload are checked below. If you have other attachments you would like to include, please check one of the Other boxes below and identify the Attachment in the box. If you are unable to upload any of the attachments, contact the CDBG Manager of the appropriate jurisdiction at least one day prior to submitting your application.

- Pro-forma "For development projects only"
- Project Service Area Map
- Project-Specific Organizational Chart [Boost_OrgChart.pdf](#)
- Agency-Wide Organizational Chart [Upwards_OrgChart_JAN2026.png.pdf](#)
- Signature Authorization - [Download, Complete, and Upload](#) [4_Signature_Authorization.pdf](#)
- Conflict of Interest Disclosure - [Download, Complete, and Upload](#) [Certification_of_Authorized_Signatory_2026-2027.pdf](#)
[Conflict_of_Interest.pdf](#)
- Environmental Review Form "For development projects only" - [Download, Complete, and Upload](#)
- CHDO or CBDO Verification
- Bylaws [Upwards_By_Laws.pdf](#)

- Articles of Incorporation
- 501(c) (3) documentation from IRS (if applicable)
- Financial Statements (1 year prior)
- Financial Statements (2 years prior)
- Financial Statements (3 years prior)
- Financial Audit (1 year prior)
- Financial Audit (2 years prior)
- Letters of Commitment "For development projects only"
- Board Resolution authorizing submittal of proposal
- Language Access Plan and (ADA) Accessibility Policy
- Job Descriptions and Resumes
- Appraisal of Property "For development projects only"
- Environmental Site Assessment "For development projects only"
- Parcel Map "For development projects only"
- Property Listing "For development projects only"
- Relocation Plan (if project anticipates displacement) "For development projects only"
- Letters of Community Support "For development projects only"
- Architectural Drawings/Plans "For development projects only"
- Other - **Testimonial - Sunnyvale**
- Other -

- [Upwards Articles of Incorporation.pdf](#)
- [IRS 501c3 Letter.pdf](#)
- [FY 2024 Upwards Care Inc. 123124 - FS Issued.pdf](#)
- [14. Audit Upwards.pdf](#)
- [Upwards Financial Statements Explanation and PandL.pdf](#)
- [FY2024 Upwards Care Inc. 123124 CDSS - Issued.pdf](#)
- [14. Audit Upwards.pdf](#)
- [Board Resolution.pdf](#)
- [17. Language Access Plan.pdf](#)
- [Job Descriptions.pdf](#)
- [Boost Team Resumes - 2025.pdf](#)
- [Provider Spotlight Testimonials.pdf](#)

(Your application will be saved)

Application Submitted by: Melanie Faure Date: 02/06/2026

Click above to return application to Draft status, and please enter a reason in the box below

Reviewed and accepted by City of Sunnyvale:
Sign Here:
Accepted status



Sunnyvale

Amanda Sztoltz
 Housing Division
 456 W Olive Ave
 Sunnyvale, CA 94087
 Phone: (408) 730-7465
 Email: asztoltz@sunnyvale.ca.gov

[Return to Main Page](#)

**Application Form and Instructions
 For Tenant Based Rental Assistance Administrator
 Program Year 2026 and 2027**

Home Investment Partnerships Program (HOME)

**Release Date: Jan. 7, 2026
 Proposals Due: Feb. 9, 2026 at 4:30 PM**

Community Development Department, Housing Division
 408-730-7250 | Sunnyvale.ca.gov

PART 1 - GENERAL INFORMATION

Organization Name:	Sunnyvale Community Services
Project Name:	Sunnyvale Tenant-Based Rental Assistance (Sunnyvale TBRA)
Contact Person:	Catherine Farry
Title:	Chief Data and Research Officer
Email:	cfarry@svcommunityservices.org
Phone:	408-636-7059
Mailing Address:	1160 Kern Avenue, Sunnyvale, CA 94085
Fax:	408-738-1125
Tax ID:	94-1713897
UEI Number:	LV2JBL2FB2Z1

A UEI number (Unique Entity Identifier) is a 12-character alphanumeric ID used by the U.S. federal government to identify entities, replacing the old DUNS number, and is obtained for free through the SAM.gov system

[Save and Continue](#)

PART 2 - FUNDING REQUEST

1. Requested Amount	\$2,700,000
2. Other Funding Sources (match)	\$905,477
3. Total Project Cost (Line 1 + Line 2)	\$3,605,477

Type of funds requested (you may select more than one)

- HOME Low-Moderate Housing

[Save and Continue](#)

PART 3 - PROJECT DESCRIPTION

Please provide a brief description of the proposed project. The description should be no more than 5 sentences, describe the project, not the organization, the number of unduplicated persons the project will serve, and/or other measurable objectives the project will meet during the contract period.

Sunnyvale Community Services (SCS) proposes to administer the Sunnyvale Tenant-Based Rental Assistance (TBRA) Program, providing rental assistance and coordinated supportive services to up to 40 low-income Sunnyvale households at any given time to stabilize housing and prevent displacement as they work toward self-sufficiency. SCS will support participants in securing and maintaining housing in Sunnyvale through targeted interventions, including intensive case management, housing navigation, landlord engagement and mediation, and connections to public benefits, healthcare and medical services, employment supports, and other stabilizing resources aligned with each household's assessed self-sufficiency needs. Total participation is projected at 50 unduplicated households (approximately 100 individuals) from July 2026 through June 2028, with 10 households exiting yearly. The Sunnyvale TBRA program will serve unhoused persons and individuals/families at imminent risk of homelessness who live or work in Sunnyvale or have a child in a school located in Sunnyvale, with a verified household income of less than 50% Area Median Income (AMI). SCS will offer all participants comprehensive safety-net services customized to meet their individual needs, promoting housing stability.

[Save and Continue](#)

Applicant Information

Type of Organization:	(Check all that apply)
<input checked="" type="checkbox"/> Non-Profit	<input type="checkbox"/> Public Agency
<input type="checkbox"/> Faith-Based Non-Profit	<input checked="" type="checkbox"/> Sunnyvale CBDO
Name of Organization:	Sunnyvale Community Services
Mailing Address:	1160 Kern Avenue
City, State, Zip Code:	Sunnyvale, CA, 94085
Physical Address of Project:	1160 Kern Avenue
City, State, Zip Code:	Sunnyvale, CA, 94085
Contact Person:	Catherine Farry
Telephone:	408-636-7059
Fax:	408-738-1125
Email Address:	cfarry@svcommunityservices.org

Provide the following information for a **program contact person**, a **financial contact person**, the **person who wrote the application**, and an **authorized contact**. Include attachments of job descriptions and resumes for key staff.

	NAME/TITLE	PHONE/EMAIL
Program Contact Someone who works with the project on a daily basis, and can answer questions	David Hernandez/Chief Programs Officer	408-738-4321 x2016/dhernandez@vcommunityservices.org
Finance Contact	John Wong/Chief Finance Officer	408-617-7263/jwong@svcommunityservices.org
Application Contact Person who wrote this application	Catherine Farry/Chief Data and Research Officer	408-636-7059/cfarry@svcommunityservices.org
Authorized Contact Person authorized to make commitments on behalf of the organization	Marie Bernard/Executive Director	408-738-0121/mbernard@svcommunityservices.org

I certify that the information contained in this application is true and correct, and that it contains no falsifications, misrepresentations, intentional omissions, or concealment of material facts. I further certify that no contracts have been awarded, funds committed, tenants displaced, or construction begun on the proposed project and that none will be done prior to issuance of a release of funds by City of Sunnyvale.

Signature of Authorized Contact Listed Above	Marie Bernard	Date:	02/09/2026
Typed Name	Marie Bernard		
Title	Executive Director		

[Save and Continue](#)

SECTION 1 - ORGANIZATIONAL CAPACITY AND EXPERIENCE

A. Provide an organizational overview of your agency, including:

- a description of the history and purpose of the organization,
- years in operation,
- years of direct experience with proposed project type,
- staff experience with proposed project type,
- federal grant management experience,
- financial capacity, and
- CBDO qualifications, if applying for a CBDO activity (See CFR 570.204)

For over 55 years, Sunnyvale Community Services (SCS), a 501(c)(3) nonprofit organization serving residents of Sunnyvale, California, has been dedicated to preventing homelessness and hunger in our community. SCS provides reliable access to nutritious groceries, vital financial assistance to prevent homelessness and eviction, referrals to healthcare services and essential public benefits, and wrap-around case management tailored to meet each client's unique needs. By proactively removing systemic obstacles, SCS ensures measurable housing retention, promotes long-term self-sufficiency, and serves as the critical safety-net hub for unhoused and underserved individuals and families in north Santa Clara County.

Our mission is to prevent homelessness and hunger in our local community. Our vision is a community where everyone has a home with food on the table. As part of the Santa Clara County Emergency Assistance Network (EAN), we are the sole agency designated to provide emergency aid to low-income Sunnyvale residents.

SCS' professional staff of case workers and case managers has extensive experience providing a wide range of assistance to low-income households, including financial coaching, housing search assistance, landlord negotiations and referrals to other services. We have been providing case management services to Sunnyvale TBRA households for ten years. We have also administered rental assistance programs, including the City of Sunnyvale's Homeless Prevention and Rapid Rehousing (HPRR) program for six years, and the City of Sunnyvale's TBRA program since July of 2022.

SCS has decades of experience in federal grant management through various programs including Community Development Block Program (CDBG) projects and loans and Emergency Food and Shelter Program (EFSP) funding for rental assistance, emergency food, and motel stays for Sunnyvale residents in need of assistance.

We have sound financial reserves and funding sources for our programs and projects. We hold a minimum of two months of operational

B. Provide your organizational experience assisting clients secure temporary or permanent housing. Describe the type of program that provided the assistance, the populations targeted, and evidence of housing services success.

SCS has been helping low-income clients secure temporary or permanent housing through multiple programs for over four decades. The populations targeted for all programs are individuals and families experiencing, or at risk of, homelessness who earn 80% or less of the Area Median Income (AMI), which the Department of Housing and Urban Development (HUD) defines as Low Income, and unsheltered individuals and families.

Our recent experience in these programs includes: Supportive Services for Veteran Families (SSVF). A joint program of the County of Santa Clara and the U.S. Department of Veterans Affairs, SSVF seeks to rapidly re-house unsheltered Veteran families and prevent homelessness for very low-income veterans at imminent risk due to a housing crisis. As an SSVF grantee from 2015-2018, SCS screened and worked with clients to provide both homelessness prevention and rapid rehousing as well as after-care case management services. Through this work, SCS developed proven systems for client assessment, housing navigation, landlord engagement, and wrap-around service delivery, ensuring measurable housing retention and household stabilization outcomes. During our involvement in this program, SCS successfully placed 24 veterans and their families in housing.

City of Sunnyvale's Homeless Prevention and Rapid Rehousing Program (HPRR) for seven years from 2015 – 2020 and in 2021-2022. This program provided short-term housing for individuals and families who were unsheltered or at risk of losing their housing and offered supportive services and case management to help tenants find stable housing. SCS successfully assisted 160 households with rapid rehousing who were unsheltered or at risk of imminent eviction during this time.

County of Santa Clara Homelessness Prevention System (HPS). SCS is a founding agency of HPS, a joint program of Destination Home and the County Office of Supportive Housing (OSH). SCS has participated in this network since 2017 and is the largest provider of assistance in this network of 19 participating agencies. HPS provides assistance to low-income families or individuals who are at risk of losing their housing through temporary financial assistance, intensive case management, and connection to other safety-net services. Preventing homelessness for these households in a number of cases requires relocation/rehousing. SCS has developed robust, cross-county systems for client assessment, rapid intervention, and coordinated service delivery, demonstrating our proven capacity to prevent displacement, stabilize households, and achieve measurable housing outcomes across multiple jurisdictions. SCS has a 98% housing retention success rate for our HPS households (remaining stably housed for at least 12 months after termination of assistance) as measured by the County's Homelessness Management Information System (HMIS). Additionally, 96% of households that SCS assisted through this program did not enter or re-enter emergency shelter or transitional housing within two years of termination of assistance. In our last fiscal year, SCS provided \$1.87M in financial assistance through the HPS program.

County of Santa Clara Homelessness Prevention (HP) Program. This program is operated by the Office of Supportive Housing with the goal of providing assistance to low-income families or individuals who are at risk of losing their housing through temporary financial assistance, case management and other services. This program acts as an additional safety-net for at risk households not eligible for services through the Santa Clara County coordinated entry system. SCS has worked with County HP since 2015.

C. Provide your organizational experience providing case management services. Describe the type of program that provided the services, the populations targeted, and evidence of case management success.

SCS has provided case management services since 2014 and now refers clients to one of several case management programs depending on their individual situation. All clients who come to SCS seeking assistance are evaluated and income is verified upon intake. Clients are then enrolled in case management services if the evaluation determines that these services are needed.

All SCS programs are targeted to serve individuals and families who earn 80% or less of the Area Median Income (AMI), which the Department of Housing and Urban Development (HUD) defines as Low Income. However, only 2% of SCS clients earn even that much. Approximately 87% are Extremely Low Income (30% of AMI) and another 11% are Very Low Income (50% of AMI).

All SCS case managers complete a minimum of three months of customized training, supplemented by additional program- or client-specific certifications, equipping them to address complex housing instability and systemic barriers. Case managers work directly with participants to stabilize housing, prevent displacement, and connect households to benefits, healthcare, employment, and other critical supports. They also make direct referrals to medical, mental health, legal aid, employment, and education programs as well as provide credit and budget counseling.

SCS maintains specialized in-house expertise to meet diverse client needs, including medical case management for frail or high-risk clients; in-home services for homebound households; benefits navigation for complex cases; financial literacy and budgeting; and housing placement expertise across low-income, subsidized, and market-rate units.

Through this structured, client-centered approach, SCS case managers coordinate targeted interventions that result in measurable housing retention, crisis prevention, and long-term stability, demonstrating the organization's capacity to deliver intensive, high-impact services at scale.

D. Provide your organizational experience working with mental, behavioral, and medical professionals.

SCS works closely with partner agencies in the community to provide direct connections and referrals to government benefits and services, especially for mental, behavioral, and medical professionals. We host both the Bill Wilson Center and the County of Santa Clara Behavioral Health Services agency at our offices on a regular basis to screen and provide broader support to clients with mental and/or behavioral challenges.

SCS connects clients needing mental or behavioral health support to NAMI Santa Clara County, the TRUST Field Response Program, and County Behavioral Health Services, ensuring access to specialized care.

SCS also hosts quarterly resource fairs, bringing together 60+ partner agencies to provide preventive and wellness services, including

E. Provide your organizational experience working with HMIS & VI-SPDAT coordinated entry procedures. Do any staff have training to conduct VI-SPDAT assessments?

In partnership with Destination Home, the County of Santa Clara, and the Santa Clara County Emergency Assistance Network (EAN), SCS has over a decade of experience working with HMIS, the Vulnerability Index - Service Prioritization Decision Assistance Tool (VI-SPDAT) screening tool, and Coordinated Entry procedures. We have extensive experience administering the VI-SPDAT to connect unsheltered families and individuals to appropriate programs and services across Santa Clara County.

All SCS case workers and managers are trained in, and utilize, both the VI-SPDAT and the Homelessness Prevention Assessment Tool (HPAT) for screening and assessment in client intake and evaluations. All client information and details of assistance provided are entered into HMIS when required by funders.

SCS participates in the County of Santa Clara Coordinated Entry (CE) process to ensure that clients who are screened are placed in the correct pathways for rapid rehousing, permanent housing or homelessness prevention.

F. Provide your organizational experience with networks and local collaborative efforts.

Collaboration is integral to our work and SCS has deep and broad organizational experience working with networks and in local collaborative efforts. In addition to participating in the Santa Clara County Homelessness Prevention System (HPS) other partners include:

- * Santa Clara County Emergency Assistance Network (EAN) delivers coordinated support for Bay Area residents facing urgent needs. SCS is a founding and active member of the EAN, which is currently convened by United Way of the Bay Area. Members meet monthly to share information and coordinate activities.
- * Santa Clara County Continuum of Care (CoC) Service Provider Network (SPN) connects numerous non-profit agencies and local governments that offer housing, support, and resources to people experiencing homelessness.
- * The Chronicle Season of Sharing Fund provides emergency aid to prevent homelessness and hunger across nine counties. SCS has been the fiscal administrator of the Season of Sharing fund in Santa Clara County for the last 20 years.
- * The Society of St. Vincent de Paul (SVdP) of Santa Clara County provides critical support to residents of Santa Clara County who are struggling to make ends meet. SCS maintains a close referral and mutual support relationship with the Sunnyvale branch of SVdP. SVdP has been SCS' back-up during our annual holiday closure for 16 years, helping with emergency food or financial assistance requests during the week-long closure.
- * Sunnyvale Unhoused Collaborative, managed through the Office of County Supervisor Otto Lee, coordinates the efforts of unhoused providers in Sunnyvale.
- * Collaborating Agencies Disaster Relief Effort (CADRE) for Santa Clara County leads a network of organizations that provide community services that are essential in times of disaster. SCS is also a key point of contact for individual, city-wide, and county-wide emergencies.
- * Silicon Valley Council of Nonprofits Network (SVCN) facilitates nonprofit collaboration and collective impact.
- * Second Harvest of Silicon Valley (SHSV) distributes in-kind food and operates a food recovery network. SCS has been an active partner with Second Harvest of Silicon Valley (SHSV) for over 30 years and meets quarterly on food needs. We have been part of SHSV's food recovery network to rescue groceries from local food sources, using food safety protocols, for more than 12 years.
- * The new Santa Clara County Food Recovery Program works to increase food recovery in Santa Clara County. SCS has been awarded the role of Lead Planning Organization for the North County Recovered Food Hub, coordinating with other organizations across the County and leading efforts in North County to increase food recovery in Santa Clara County.
- * Local school districts including Sunnyvale School District (SSD; elementary and middle schools) and the Fremont Union High School District (FUHSD; high schools). We stock school snack pantries and nine schools and representatives from both school districts serve on our board. Input from both district and school-level personnel helps us define new programs and services for households with school-age children.

We host dozens of agencies at no cost to them in a coordinated one-stop-shop model at our offices, including The Law Foundation of

G. Provide your organizational experience operating a TBRA or similar program.

- Provide the length program,
- Program structure,
- Program achievements
- Program struggles,
- If the program is current. If not, explain why.
- Monitoring history and results of the program

SCS is the current administrator of the City of Sunnyvale's TBRA program and has administered this program for four years, since July of 2022. We have also been providing case management services to Sunnyvale TBRA households for ten years.

PROGRAM LENGTH
SCS has operated the Sunnyvale TBRA program since July of 2022.

PROGRAM STRUCTURE
The Sunnyvale TBRA Program is operated by a dedicated team consisting of a TBRA Program Manager, a TBRA Case Manager, and a TBRA Housing Specialist. The Program Manager and Case Manager provide direct case management, supporting participants with housing stabilization, benefits access, and individualized self-sufficiency planning. The Housing Specialist focuses on identifying and securing appropriate housing and maintains direct engagement with landlords to ensure clear understanding of program requirements and expectations.

This independent TBRA team is fully integrated into SCS' broader supportive services system, allowing participants to access additional resources such as benefits navigation, healthcare referrals, financial counseling, and other wrap-around supports. At any given time, the program can serve 40 active households. Households can be approved to participate for up to 24 months, with approximately 10 households exiting annually.

To address the changing needs of the community around housing and security we are planning to utilize TBRA resources to actively support Sunnyvale families who are at imminent risk of homelessness and who are not eligible for other supportive services to prevent evictions. SCS' long history in homelessness prevention and rapid rehousing will help ensure that the program is successful in helping up to 40 eligible Sunnyvale households at any time.

PROGRAM ACHIEVEMENTS
The full integration of the TBRA program with all SCS supportive services gives TBRA participants full and immediate access to all SCS services including food programs, case management, benefits referrals and connections to other necessary support services. This integration allows us to rapidly rehouse our TBRA program participants into the community and increases the probability of their continued long-term housing stability after program completion.

Since July 2022, sixty-six households have been enrolled in the Sunnyvale TBRA program. Forty-nine households have been housed by SCS and fifty-eight households have exited the program. Since July 2024, 91% of households that have exited the Sunnyvale TBRA

H. Provide your organizational experience managing grant funds. Be sure to include policies and internal reviews.

SCS has managed federally funded CDBG projects for over 30 years and has received EFSP (FEMA) funding for over two decades. We received a CDBG loan in 2003 through the City of Sunnyvale for our previous building (725 Kifer Rd.) and a forgivable CDBG loan in 2019 for our new building (1160 Kern Ave.). SCS provided Supportive Services for Veteran Families for four years. As a major partner in the county-wide Homelessness Prevention System (HPS), SCS distributed several million dollars of federal Covid-19 relief funding (made available through the Emergency Rental Assistance Program [ERAP] and the American Rescue Plan [ARP]).

SCS has received both CDBG and HPRP contracts from the City of Sunnyvale. SCS also received HUD funds from the City for Covid emergency assistance and is currently receiving funds for the Sunnyvale TBRA Program.

SCS also manages millions of dollars annually in grant funding from non-federal government sources, corporations, and foundations.

POLICIES

I. Identify agency personnel who will be directly involved in implementing the TBRA program. Describe all relevant experiences of each individual.

David Hernandez, Chief Programs Officer – David has been with SCS for over eleven years and currently is responsible for all programs and services offered by SCS. At SCS, David has direct experience as an Intensive Case Manager and has been the Program Manager of Homelessness Prevention and Rapid Rehousing.

Roshuna Creswell, Director of Programs – Roshuna has been with SCS for eight years and currently is responsible for all case management work including client intake, TBRA, HPS, and benefits referrals. She has experience at all levels of case management at SCS and directly supervises all program staff.

Ariana Quintero, TBRA Program Manager – Ariana has been with SCS for four years and has, in that time, worked exclusively with the TBRA program. She has experience as a TBRA Housing Case Manager and now currently operates as the TBRA Program Manager. Her four years with the TBRA program have given her deep and thorough knowledge of the program. Ariana holds a Public Housing Manager (PHM) Certification, Housing Quality Standards (HQS) certification, Housing Choice Voucher (HCV) Specialist Certification, Fair Housing and Reasonable Accommodation Certification and has completed Fair Housing Certification Training.

Yadira Tejada, TBRA Housing Case Manager– Yadira has served as the TBRA Housing Case Manager for more than a year. Prior to coming to this role, Yadira worked for over 10 years with practical experience in case management and other supportive services,

J. Describe your knowledge and experience with available County resources.

SCS has worked closely with the County of Santa Clara since our founding in 1970. Over the last 55 years we have developed extensive knowledge and experience with a variety of County resources, including working with, and participating in, many county networks, including:

- * Ongoing work and collaboration with the County of Santa Clara Office of Supportive Housing (OSH) through HPS and the County HP program.
- * Participation in the Santa Clara County Continuum of Care (CoC) Service Provider Network (SPN) that connects numerous non-profit agencies and local governments that offer housing, support, and resources to people experiencing homelessness.
- * Participation in the County of Santa Clara Behavioral Health Services Navigator Program (program currently on hold).
- * Hosting the County of Santa Clara Behavioral Health Services agency at our offices on a regular basis to screen and provide support to clients with mental and/or behavioral issues.
- * Participation in Collaborating Agencies Disaster Relief Effort (CADRE) for Santa Clara County.

K. Describe any large organizational changes that occurred in the last five years. This could include new board members, new staff, new funding, new operational structures, new missions, etc.

SCS Board of Directors
Since 2021, our Board of Directors has expanded from 18 to 21 members. Per our organization by-laws, Board members may serve up to 6 years, with specified exceptions, and the tenure of our Board of Directors is arranged so that one-third of the terms expire annually. Consequently, 19 of the current 21 Board members are new in the last five years.

Staff and Organizational Structure
In the last five years the SCS staff has grown from 45.5 to our current staffing of 49, a 7.7% increase, while the number of individuals we have served over this same period has grown by 9%.

Our organizational structure has also adjusted to meet the increase in demand and our growth into a safety-net hub for north Santa Clara County:

- * Warehouse operations and logistics is now part of the Food & Nutrition Program team, streamlining operations and coordination.
- * The Community Engagement team is now an independent team to meet the increased demand for community engagement activities.

In addition to recruiting and organizing the critical volunteers that support our food programs, this team also operates key community programs including the Community Leaders program, Ready to Learn backpack distributions, Holiday Center and Quarterly Resource Fairs.

- * A new Chief Development Officer joined SCS in 2023 with a focus on increasing engagement with individual donors.
- * A new Chief Financial Officer joined in 2024 to replace the departing CFO.

New Program

[Save and Continue](#)

SECTION 2 - EVIDENCE OF NEED FOR PROJECT

A. In detail, describe your target population and referral sources.

Per federal guidelines, eligibility for Sunnyvale TBRA will be limited to households earning 50% or less of the Area Median Income (AMI) as defined by the U.S. Department of Housing and Urban Development. However, only 2% of SCS clients earn even that much. Approximately 87% are Extremely Low Income (30% of AMI) and another 11% are Very Low Income (50% of AMI).

According to the U.S. Census Bureau's American Community Survey (2024 ACS 1-Year Estimates), approximately 6.5% of Sunnyvale residents live in poverty. 7.5% of children (under 18 years of age) and 11% of seniors (65+ years) in Sunnyvale live in poverty (5.3% of residents aged 18-64). These estimates, however, are based on the Federal Poverty Level (FPL) definition, which has a single value nationwide for a household size and doesn't consider variation in cost of living across states.

According to the Economic Research Institute, the cost of living in Sunnyvale is 67% higher than the national average [Cost of Living Data in Sunnyvale, CA, 2025]. This means that the actual number of people living in poverty in Sunnyvale is considerably higher than the U.S. Census reports. In Santa Clara County, even a household of four earning 200% of FPL (approximately \$64,300) struggles to make ends meet. Therefore, SCS uses the area median income (AMI) guidelines from the U.S. Department of Housing and Urban Development (HUD) as a more accurate gauge of economic instability. Santa Clara County registers the highest median income in the state (\$195,200 for a family of four) in 2025.

The target population for the Sunnyvale TBRA program is people at risk of homelessness or who are already unhoused. This population is a good fit for a time-limited rental assistance program because they are typically working, but the income they are generating isn't sufficient to afford the high rents in the area or they don't have the savings required to cover the large move-in costs. Time-limited rental assistance is typically all the assistance that is needed to keep these individuals housed through their emergency and to give them the opportunity to recover their footing.

SCS maintains deep ties with multiple partners in the community that serve as referral sources for this program:

- * SCS itself, which annually provides safety-net services to more than 11,500 low-income Sunnyvale residents. SCS now hosts an annual Unhoused Resource Fair with over 20 partner agencies on site.
- * Bill Wilson Center, which operates the North County Shelter in Sunnyvale and also operates the "Here4You" hotline for unhoused residents.

B. Describe your methodology to secure permanent housing units for the program. Describe any existing relationships with landlords, access to units, and approach to securing housing.

SCS has over 55 years of experience working with local landlords and property management companies. Over that time, we have developed a curated, trusted database of landlords willing to partner with nonprofits and support clients in maintaining stable housing. When securing units for TBRA clients, SCS follows a structured, multi-step process:

- * Database and Existing Relationships: The Housing Specialist accesses the curated landlord database to identify potential units, leveraging long-standing trust and a proven track record in resolving tenant issues collaboratively. Landlords often proactively contact SCS when tenants face rental challenges, further expanding housing options for participants.
- * Client-Led Unit Selection: Clients have the flexibility to identify units throughout Santa Clara County, not limited to Sunnyvale. The Housing Specialist meets with prospective landlords to present program services, establish expectations, and build trust, ensuring strong landlord relationships from the outset.
- * Ongoing Network Expansion: SCS actively recruits new landlords and housing opportunities through community-sponsored campaigns, outreach events, and engagement initiatives, continuously expanding the network of available units for clients.
- * Collaborative, Data-Driven Approach: SCS maintains detailed records of housing outcomes, unit availability, and landlord interactions, using this data to refine placement strategies, proactively address barriers, and ensure clients are successfully housed. These strong relationships within Sunnyvale and around Santa Clara County make it easier for SCS to support clients in locating and securing housing.

Once housing is secured, SCS has also established effective processes to maximize engagement and communication with property owners and managers to ensure successful and ongoing participation. Components of this system include:

- * The TBRA Housing Specialist engages directly with landlords to ensure clear communication regarding operational changes such as staffing, points of contact, delays or interruptions affecting rental assistance or leasing payments to landlords, and redetermination of tenant rent for participants who have lost or had reduced income.
- * Timely rent payments from SCS to landlords are customized to each landlord's preference so they receive payment in the method they prefer (certified payment, electronic payment or basic check).
- * Landlord/tenant education is provided for all parties, including case managers and other staff who interact with landlords and renting

C. Describe the methodology your agency uses for intake procedures, assessing service needs, and evaluating barriers to self-sufficiency. Include information on how critical issues such as mental health, physical health, drug abuse or other related conditions are addressed.

Intake procedures begin with our referrals. SCS ensures our referral system is robust and informed by proactively educating and updating our partners on eligibility criteria and changes to programs that impact eligibility. Our partners are then able to screen clients effectively, bringing us highly qualified clients for intake and increasing our intake efficiency.

The SCS case team is trained to assess and triage clients to the appropriate community and countywide services. Our case managers utilize Santa Clara County's coordinated entry system tool, the VI-SPDAT (Vulnerability Index-Service Prioritization Decision Assessment Tool) to assess the household's situation and identify the best type of housing intervention to address their situation.

SCS case management activities for intake procedures, assessing service needs and evaluating barriers to self-sufficiency include the following activities, as appropriate for each client:

- * Initial intake assessing the client's needs through VI-SPDAT
- * Development of a case plan for each household, with specified goals
- * Frequent follow-up meetings (often weekly) and quarterly assessments

D. Describe your methodology to address these service needs and barriers.

A client's service needs and barriers are assessed during intake. SCS case management activities for addressing the identified service needs and barriers include the following, as appropriate for each client:

- * Development of a case plan for each household, with specified goals
- * Frequent follow-on meetings (often weekly) and quarterly assessments
- * Monthly monitoring checks (by telephone or in person)
- * Assistance and advocacy with applications for access to health care, nutrition programs, affordable housing, education, job training, employment, childcare, financial education, budgeting, and resource referrals
- * Care coordination
- * Referrals to public benefits
- * Access to other SCS safety-net services (food, financial aid, referrals)
- * Access to financial management and health- and nutrition-related services sponsored and/or delivered by SCS, targeted to meet specific client needs, including nutrition evaluation and recommendations by SCS' Food and Nutrition Program team
- * Access to low-cost monthly bus passes and free Clipper cards

To ensure ongoing program eligibility, we make certain that participants are following renter "best practices" including proactive

E. Describe how your agency measures the effectiveness of your case management delivery system. Include information on any improvements and/or adjustments your agency has made in its case management delivery system in the past five years. Why did you make these changes and how have they impacted outcomes?

SCS measures the effectiveness of our case management delivery system by our ability to successfully assist our clients towards self-sufficiency on exit from the case management program.

Initially, SCS case managers provided generalist support, assisting clients across a range of needs, including financial counseling, food security, and mental health. As our case management system has matured, we have implemented a specialist model, with case managers focusing on areas such as housing stability, medical needs, aging, and financial empowerment. These specialists work alongside generalist case managers to provide expert guidance, targeted interventions, and rapid responses to complex client needs.

This approach now allows SCS to assess underlying risk factors, address systemic barriers, and deliver interventions tailored to each household, accelerating progress toward housing stability, crisis resolution, and long-term self-sufficiency. All case managers participate in ongoing, targeted training, ensuring they are equipped to implement evidence-based social work practices and deliver high-impact,

F. Describe your methodology to measure client progress.

Client progress is tracked across multiple dimensions to ensure housing stability and long-term self-sufficiency:

- * Individual Goal Achievement: Case managers meet with clients once or twice each month to review progress toward personalized goals, including housing stability, financial independence, and access to supportive services. Each goal is tied to measurable steps toward self-sufficiency.
- * Program Exit and Post-Exit Outcomes: Success is measured at program completion, with a three-month post-exit housing survey to confirm that clients remain securely housed and no longer require intensive support. SCS also monitors the County HMIS database to track whether former clients re-enter services, ensuring continuous evaluation of program impact.
- * Housing Retention and Placement Metrics: We track eviction prevention, the number of households that maintain stable housing, and the number of individuals successfully placed into permanent housing. These metrics provide quantifiable evidence of program effectiveness.

Quantitatively, a Salesforce database is used to securely track and store data relating to clients (through a unique ID number), services, and outcomes.

G. Describe in detail your knowledge and methodology to comply with HOME TBRA requirements and Sunnyvale TBRA guidelines.

As the current administrator for the Sunnyvale TBRA program, our staff is fully trained on all HOME TBRA requirements and Sunnyvale TBRA guidelines. The TBRA program is fully integrated into SCS' financial procedures, and SCS' client intake procedures are in compliance with TBRA requirements. SCS is ready and able to begin this project no later than July 1, 2026.

SCS maintains comprehensive program manuals and guidelines aligned with HOME TBRA requirements, Sunnyvale TBRA standards, and HUD regulations, ensuring all staff follow consistent, evidence-based practices. The TBRA team tracks client progress and program compliance through structured documentation, checklists, and internal monitoring systems, supporting program integrity and measurable outcomes.

To maintain alignment with local priorities and respond to emerging trends, SCS holds monthly meetings with City of Sunnyvale Housing and Human Services staff to review participation patterns, identify challenges, and collaboratively problem-solve. This ongoing partnership ensures program compliance, promotes continuous improvement, and enhances housing stability outcomes for participants.

The SCS TBRA program staff have completed all required training for the TBRA program to ensure their knowledge about all

[Save and Continue](#)

SECTION 3 - STATEMENT OF WORK/PROJECT SCOPE/READINESS

A. Budget
Provide an itemized budget for each funding source. HOME funds are used for rent subsidies, security deposits, and utility allowances based on the Santa Clara County Housing Authority schedule located at <https://www.scchousingauthority.org/section-8/payment-standards-2024>.

HOME Funding (not to exceed \$1,000,000 per year)				
Line Item	Year 1 Budget		Year 2 Budget	
	HOME Budget	Other Funding Sources	HOME Budget	Other Funding Sources
Rent Subsidies	\$895,000		\$895,000	
Utility Allowances	\$65,000		\$65,000	
Security Deposits	\$40,000		\$40,000	
TOTALS	\$1,000,000	\$0	\$1,000,000	\$0

Low-Moderate Income funds from the Redevelopment Agency are to be used for supportive services that may include case management, training, counseling, program delivery costs, indirect costs, or other services that compliment the needs of the participants and the TBRA program goals.

Low-Moderate Income Funding (not to exceed \$350,000 per year)					
Line Item	Year 1 Budget		Year 2 Budget		
	Sunnyvale Budget	Other Funding Sources	Sunnyvale Budget	Other Funding Sources	
Personnel					
	FTE % Funded	Position Title			
TBRA Program Manager	100%	TBRA Program Manager	\$84,460		\$86,994
TBRA Case Manager	100%	TBRA Case Manager	\$66,414		\$68,407
TBRA Housing Specialist	100%	TBRA Housing Specialist	\$66,414		\$68,407
Data Analyst	2%	Data Analyst	\$2,500	\$2,500	\$2,575
Additional supporting services and administrative staff	0%	Intake Coordinator, Case worker, Benefits Specialist, Food & Nutrition Program Manager, Food & Nutrition Inventory Specialist, Food & Nutrition Coordinator, Accountant, IT Support Specialist		\$256,923	\$270,892
			\$0		
Personnel Benefits			\$49,976	\$60,242	\$51,476
Non-Personnel					
Direct Client Assistance			\$25,000	\$53,852	\$25,000
Staff Training & Travel			\$4,000	\$5,000	\$9,000
Program Supplies			\$5,584	\$2,500	\$1,489
Indirect Costs (De minimis as high as 15% of direct costs)			\$45,652	\$57,153	\$45,652
TOTALS			\$350,000	\$438,170	\$350,000

B. Provide a narrative of budget items

Line Item	Description
Rent Subsidies	The largest line-item in the Sunnyvale TBRA budget is monthly rental assistance subsidies for clients in the program. Funds are distributed directly to landlords.
Utility Allowances	Utility allowances are incorporated into all rent calculations for clients in the program.
Security Deposits	This line item is for security deposits needed to move program participants into housing.
Housing Staff Salaries & Benefits	One TBRA Housing Specialist (1.0 FTE) will work with landlords to ensure clear communication and to provide support for both clients and landlords. Responsible for housing search. Inspects housing units to ensure compliance with established housing quality standards. Advises tenants and property owners concerning their rights and responsibilities. Mediates and negotiates tenant/property owner rental and lease
Case Management Staff Salaries & Benefits	One TBRA Case Manager (1.0 FTE) will work with program participants to enroll them in the program and support their efforts toward self-sufficiency. Provides support to the individual or family and coordinates a variety of service activities while assisting individuals to develop self-identified goals. Develops Individual Service Plans for individuals
Program Manager Salary & Benefits	One TBRA Program Manager (1.0 FTE) will manage and supervise the Sunnyvale TBRA program.
Direct Client Assistance	Funds for direct client assistance will be used for motel assistance, housing stability assistance, and transportation assistance. Motel assistance funds will be utilized to bridge the gap between housing transitions for TBRA program participants in active housing search. Motel assistance will be provided to households who have identified viable housing placements and whose landlords have agreed to lease up. Motel placement will allow households to prepare for move in while housing quality standard inspection and other lease up activities are completed to secure a move in date. Housing stability assistance includes emergency financial assistance to
Staff Training & Travel	Staff training and travel includes training and licensing costs for program staff to maintain or update necessary licenses to operate and comply with all requirements for the TBRA program and the travel costs associated with operation of the program, including travel to evaluate potential
Program Supplies	Program supplies include supplies used directly in the administration of the TBRA program including computers and equipment and software.
Indirect Costs	Indirect costs include the overhead expenses necessary to operate the TBRA program including rent, utilities, administrative and support services, and general supplies and equipment.

C. Provide a description of how many households will be served annually was calculated

Because SCS is the current administrator of the TBRA program, we assume quickly ramping up to full participation of up to 40 households in the program at any one time. We also assume that, during the year, half the households will be onboarding, and half the households will be completing their second year. There will typically be an even number of first-year and second-year households enrolled in the program.

Based on the average cost of supporting TBRA households in the past year, we estimate that the cost of one household in the first year of participation in the program is the cost of rent plus the cost of a security deposit which is \$2,000/month*12 months + \$2,000 = \$26,000. The cost for one household in the second year of the program will be the cost of rent which is \$2,000/month*12 months =

D. List all other funding sources and if funding will be used for the TBRA program.

Funding Source	Amount (Estimated)	Used for TBRA (Y/N)	Other Notes
Government (Federal, State, County, City)	\$3,530,004	Y	A portion of these funds will be used for the TBRA program
Fees/Earned Income	\$102,840	N	
Individuals	\$3,561,363	Y	A portion of these funds will be used for the TBRA program
Corporate and/or foundation grants	\$1,986,500	Y	A portion of these funds will be used for the TBRA program
Other Corporate Donations	\$592,200	Y	A portion of these funds will be used for the TBRA program

[Save and Continue](#)

E. Describe the commitment level of all funding sources listed

Government funds (including Federal, State, County, City) – Based on historical funding trends, these funds are projected to be received by the end of FY2026.

Fees/Earned Income - These funds are estimated to be received by the end of FY2026.

Individuals – Based on historical fundraising these funds are projected to be received by the end of FY2026.

F. If applicable, describe the types of in-kind services to be dedicated to the program and their approximate value.

Second Harvest of Silicon Valley (SHSV) contributes in-kind food that is distributed through our food programs, in which the majority of TBRA participants are enrolled. We estimate approximately \$11,352 of this in-kind food is distributed to TBRA participants each fiscal year (based on the Feeding America cost of \$1.90 per pound of donated food).

Volunteers play a critical role in our food programs, helping to sort, pack and distribute groceries to clients at the SCS warehouse. Our diverse volunteer base includes more than 200 community members with regular shifts plus dozens of groups from local businesses and civic organizations. In total, more than 1,100 unique individuals donate over 17,000 total hours a year to support SCS' food programs. We estimate that \$6,262 of volunteer time can be attributed to food distributed to TBRA participants in each fiscal year

G. Describe the organization's financial management practices, including financial reporting, payment procedures, audit history, regulatory compliance, and budgeting practices.

SCS is in compliance with OMB requirements and GAAP. We have an outstanding track record in fiscal management and record keeping. Our financial audits have been "clean" as far back as our records go. Our accounting processes and systems are up to date. Duties and responsibilities are separated to ensure there are checks and balances. All expenses must be approved by managers and invoices must be approved by two managers before payments are made. Monthly revenue and expenses are compared against our board approved budgets to identify and analyze key variances.

We have sound financial reserves and funding sources for our programs and projects. We hold at least two months of operational cash reserves, in compliance with established Board of Directors reserve guidelines, to ensure our ability to financially sustain our operational and programmatic costs. Current operational reserves cover more than four months.

Our robust financial and data reporting infrastructure is designed to ensure that financial records are accurate and that all grant-

H. Calculate the financial ratios below using most recent audited financial statements

	Ratio #1 - Current Ratio		Ratio #2 - Debt Ratio		Ratio #3 - Program Expense Ratio	
1	Current Assets	\$6,330,012	Total Liabilities	\$4,164,225	Program Services Expenses	\$11,966,545
2	Current Liabilities	\$1,164,225	Total Assets	\$24,770,480	Total Expenses	\$13,896,608
	Current Ratio	5.44%	Debt Ratio	5.95%	Program Exp Ratio	0.86%

Attachments

[\(Upload Instructions\)](#)

Please provide supporting document attachments below. Several attachments are REQUIRED by all applicants in order to submit your application, and your application WILL NOT be able to be submitted with missing attachments! There are several additional attachments that are REQUIRED depending on if the project is related to developing affordable housing. Please take this into consideration when timing your submission of this application. The documents you need to upload are checked below. If you have other attachments you would like to include, please check one of the Other boxes below and identify the Attachment in the box. If you are unable to upload any of the attachments, contact the CDBG Manager of the appropriate jurisdiction at least one day prior to submitting your application.

- Signature Authorization [2026-SCS-TBRA-SigAuthForm.pdf](#)
- CHDO or CDBO Verification [SCS_FY2026_CBDO_Verification_Letter-TBRA.pdf](#)
- Bylaws [SCS_By_Laws.pdf](#)
- Articles of Incorporation [SCS_Articles_of_Incorporation.pdf](#)
- 501(c) (3) documentation from IRS Organizational Chart [SCS_IRS_letter_Nov2021.pdf](#)
- Project Organizational Chart [SCS_TBRA_Org_Chart-20260205.pdf](#)
- Financial Audit [SCS_FY2024-2025_Audit_Final.pdf](#)
- Most Recent Financial Audit [SCS_FY2024-2025_Audit_Final.pdf](#)
- Director's and Officer's Liability & Errors and Omissions Insurance [2025_Policy_-_Client_Copy_Directors__Officers_Liability.pdf](#)
- Language Access Plan and (ADA) Accessibility Policy [SCS_Language_Access_FY2026.pdf](#)
[SCS_Accessibility_Plan_FY2026.pdf](#)
- Job Descriptions and Resumes [SCS_TBRA_Job_Description_and_Key_Resumes.pdf](#)

(Your application will be saved)

Application Submitted by: Catherine Farry Date: 02/09/2026

Reviewed and accepted by City of Sunnyvale:

Sign Here:
Accepted status

Click above to return application to Draft status, and please enter a reason in the box below



Sunnyvale

Amanda Sztoltz
 Housing Division
 456 W Olive Ave
 Sunnyvale, CA 94087
 Phone: (408) 730-7465
 Email: asztoltz@sunnyvale.ca.gov

[Return to Main Page](#)

**Application Form and Instructions
 For Tenant Based Rental Assistance Administrator
 Program Year 2026 and 2027
 Home Investment Partnerships Program (HOME)**

**Release Date: Jan. 7, 2026
 Proposals Due: Feb. 9, 2026 at 4:30 PM**

Community Development Department, Housing Division
 408-730-7250 | Sunnyvale.ca.gov

PART 1 - GENERAL INFORMATION

Organization Name:	LifeMoves
Project Name:	LifeMoves- TBRA
Contact Person:	Scott Nielsen
Title:	Director of Grants, Contracts, and Compliance
Email:	devgcc@lifemoves.org; snielsen@lifemoves.org
Phone:	650-685-5880
Mailing Address:	2550 Great America Way, Suite 201, Santa Clara, CA, 95054
Fax:	N/A
Tax ID:	77-0160469
UEI Number:	PTNGHYLHY9G3

A UEI number (Unique Entity Identifier) is a 12-character alphanumeric ID used by the U.S. federal government to identify entities, replacing the old DUNS number, and is obtained for free through the SAM.gov system

[Save and Continue](#)

PART 2 - FUNDING REQUEST

1. Requested Amount	\$2,700,000
2. Other Funding Sources (match)	\$125,086
3. Total Project Cost (Line 1 + Line 2)	\$2,825,086

Type of funds requested (you may select more than one)

- HOME
- Low-Moderate Housing

[Save and Continue](#)

PART 3 - PROJECT DESCRIPTION

Please provide a brief description of the proposed project. The description should be no more than 5 sentences, describe the project, not the organization, the number of unduplicated persons the project will serve, and/or other measurable objectives the project will meet during the contract period.

LifeMoves' proposed TBRA program connects households, families with minor children and/or single adults, as quickly as possible to permanent housing through individualized case management and supportive services. Over the two-year contract term, the project will serve 62 unduplicated households, offering rental subsidies that limit participant rent contributions to 30% of household income, along with assistance for move-in costs such as deposits, utilities, and basic furnishings. Households will receive support throughout a one-year lease term, with assistance available for up to 24 months as needed to promote housing stability. The project aims for 85% of participating households to successfully complete their housing lease during the program period. Additionally, 85% of households are expected to maintain housing one year after placement, demonstrating sustained housing outcomes.

[Save and Continue](#)

Applicant Information

Type of Organization:	(Check all that apply)
-----------------------	------------------------

Non-Profit Public Agency Faith-Based Non-Profit Sunnyvale CBDO

Name of Organization:	LifeMoves
Mailing Address:	2550 Great America Way, Suite 201
City, State, Zip Code:	Santa Clara, CA, 95054
Physical Address of Project:	2550 Great America Way, Suite 201
City, State, Zip Code:	Santa Clara, CA, 95054
Contact Person:	Aubrey Merriman
Telephone:	650-685-5880
Fax:	N/A
Email Address:	amerriman@lifemoves.org

Provide the following information for a **program contact person**, a **financial contact person**, the **person who wrote the application**, and an **authorized contact**. Include attachments of job descriptions and resumes for key staff.

	NAME/TITLE	PHONE/EMAIL
Program Contact Someone who works with the project on a daily basis, and can answer questions	Alexandra Rosas/Associate Director of Community Housing	650-685-5880/arosas@lifemoves.org
Finance Contact	Ceren Okar/Controller	650-685-5880/cokar@lifemoves.org
Application Contact Person who wrote this application	Alexandra Fabbiani/Grants and Contracts Specialist	650-685-5880/afabbiani@lifemoves.org
Authorized Contact Person authorized to make commitments on behalf of the organization	Aubrey Merriman/Chief Executive Officer	650-685-5880/amerriman@lifemoves.org

I certify that the information contained in this application is true and correct, and that it contains no falsifications, misrepresentations, intentional omissions, or concealment of material facts. I further certify that no contracts have been awarded, funds committed, tenants displaced, or construction begun on the proposed project and that none will be done prior to issuance of a release of funds by City of Sunnyvale.

Signature of Authorized Contact Listed Above Alexandra Fabbiani	Date: 02/09/2026
Typed Name	Alexandra Fabbiani
Title	Grants and Contracts Specialist

[Save and Continue](#)

SECTION 1 - ORGANIZATIONAL CAPACITY AND EXPERIENCE

A. Provide an organizational overview of your agency, including:

- a description of the history and purpose of the organization,
- years in operation,
- years of direct experience with proposed project type,
- staff experience with proposed project type,
- federal grant management experience,
- financial capacity, and
- CBDO qualifications, if applying for a CBDO activity (See CFR 570.204)

LifeMoves is the largest provider of interim housing, outreach programs, and supportive services for individuals, couples, and families experiencing homelessness in Silicon Valley and operates 27 interim housing communities across San Mateo and Santa Clara Counties. The agency has been in operation since 1967, formally known as Inn Vision (Santa Clara County) Shelter Network (San Mateo County) and later rebranded as LifeMoves in 2016. More specifically, LifeMoves' Community Housing Department has more than two decades of experience operating 'rapid re-housing' and similar permanent housing type of programs. LifeMoves brings deep expertise in serving a diverse range of clients, from those facing homelessness for the first time to individuals experiencing chronic homelessness and anyone in between. LifeMoves leadership team and stability-first model are built to deliver the highest standard of personalized care to every participant. Guiding this work is Anat Leonard-Wookey, Vice President of Programs and Services. Anat is a Licensed Clinical Social Worker with decades of experience serving individuals experiencing homelessness across some of the nation's most severely affected communities. Her career has remained deeply embedded in homeless response systems, where she has consistently championed trauma-informed, client-centered approaches. Anat holds a Master of Social Work from Columbia University and a Bachelor's Degree in Psychology and Women's Studies from Boston University. She is licensed to practice clinical social work in both California (LCSW 28639) and New York. Reporting to Anat, Alexandra Rosas the Associate Director of Community Housing. Alexandra has been a dedicated member of the LifeMoves team for more than four years. Alexandra leads and oversees complex housing programs, bringing extensive experience managing multidisciplinary teams and housing initiatives across Rapid Re-Housing, Permanent Supportive Housing, Re-Entry, Below Market Rate, Transitional Housing, and privately funded programs. As a bilingual (English/Spanish) Associate Director of Community Housing, she provides strategic and operational leadership, including staff supervision, fiscal oversight, and ensuring full compliance with public and private funding requirements. Her background spans frontline service through senior management, including housing navigation equipping her with a strong understanding of program operations, performance management, and cross-system coordination and collaboration. Alexandra's educational background in Sociology strengthens her ability to lead trauma-informed, client-centered programs while navigating complex systems to achieve measurable housing outcomes. The program manager identified to lead this TBRA project to success is a current LifeMoves program manager (already reporting to Alexandra), Dolores Ruiz. Dolores is highly qualified to manage a TBRA contract bringing nine years of experience delivering and overseeing client-centered, trauma-informed services for vulnerable populations across Bay area communities. As a bilingual Spanish speaking public health professional and current rapid housing program director, she demonstrates experience in housing-focused program management, staff supervision, fiscal oversight of rental assistance and compliance with funders. Her educational background, including a BA in Communication Studies with a Minor in Criminal Justice, certified as a community health worker, youth advocate specialist, and re-entry professional strengthens her ability to communicate effectively with partners and effectively provide service delivery. LifeMoves Programs and Administrative teams consistently support their capacity and programmatic impact. The Human Resources department rapidly hires qualified candidates, in the Development department philanthropy efforts continue to secure additional resources, and the Operations and facilities team is always exploring new ways to be more efficient in operating and maintaining LifeMoves (interim housing) sites. LifeMoves has extensive federal grant management experience and have successfully operated contracts under federal ESG funding, HUD funding, BSCC funding, VA funding and others such as ESG-CV funding opportunities. LifeMoves demonstrates strong financial capacity through established fiscal controls and reliable cash flow management systems that support timely billing and uninterrupted program operations. Paul Simpson, CFO of LifeMoves, is building the operational and investment strategy needed to achieve the organizations new vision of ending homelessness in Silicon Valley. And, he has the track record to do it. Paul is an Oakland, CA native with strong and long-term ties to the Bay Area. He is a respected executive with outstanding interpersonal and consensus-building skills, capable of leading and motivating teams to deliver superior results. Recognized as a creative and effective strategic planner, facilitator, and problem solver. In addition to strong financial acumen, Paul brings a wealth of leadership qualities from his 20-year career in advising companies on financial strategies, acquisitions, and technology roll-outs. In addition to his deep financial acumen and experience, he has extensive experience in Technology/IT/Data, fundraising, strategy, and venture investing. His dynamic leadership style that values and promotes diversity, collaboration,

B. Provide your organizational experience assisting clients secure temporary or permanent housing. Describe the type of program that provided the assistance, the populations targeted, and evidence of housing services success.

Our organization has extensive experience assisting households experiencing homelessness to secure temporary and permanent housing through inclement weather beds, emergency shelter, interim housing, motel-based interim housing, and rapid re-housing programs. These programs are designed to address immediate safety and stabilization needs while rapidly transitioning households into temporary and/or permanent housing using a stability-first and client-centered approach. More broadly, in FY25, LifeMoves Outreach programs helped move people out of unsheltered homelessness and into housing at a steady, meaningful pace, connecting more than one person every day to a housing solution. Over the course of the year, 587 outreach clients were successfully connected to housing through a range of options, including interim housing (shelter), permanent housing, temporary housing alternatives such as reunification, inclement weather programs, on-demand beds, and medical respite. Interim housing can play a critical role in this continuum of care. Of the 587 clients connected to housing, 396 individuals (67%) accepted an interim supportive housing placement. Among LifeMoves shelter (interim housing) clients that were previously served by LifeMoves Outreach teams, nearly half (46%) of those with known exits ultimately transitioned to a permanent home. More specifically to the TBRA program, housing assistance may include: placement into shelter or motel stays, housing navigation, landlord outreach and engagement, assistance with housing applications, coordination of move-in costs and short- and medium-term rental assistance, and ongoing stabilization support through case management. In addition, staff will work closely with Coordinated Entry, the Santa Clara County Office of Supportive Housing, and

C. Provide your organizational experience providing case management services. Describe the type of program that provided the services, the populations targeted, and evidence of case management success.

Our organization has extensive experience providing comprehensive, housing-focused case management across emergency shelter, transitional housing, and rapid re-housing programs. Case management services are grounded in a trauma-informed, strengths-based approach and are designed to support housing stability, safety, and long-term self-sufficiency. Programs primarily serve families with children experiencing homelessness, including households fleeing domestic violence, families with extremely low incomes, and those facing multiple barriers such as unemployment, limited rental history, behavioral health needs, and chronic health conditions. Case managers work collaboratively with participants to develop individualized service plans that address immediate needs while advancing permanent housing goals. Case management services include housing navigation and placement, landlord engagement, benefits advocacy, employment and income stabilization, connection to medical and behavioral health services, and coordination with community partners. Staff also provide ongoing support after housing placement to promote retention and stability. Evidence of case management success includes high rates of exits to permanent housing, improved income and benefits enrollment, increased engagement in health and behavioral health services, and sustained housing stability following program exit. Despite the Bay Area's extreme housing challenges, in FY25, 68% of families/couple's exiting LifeMoves interim housing programs moved into permanent housing (up from 57% in FY24). Also in FY25, 26% of single adults exiting LifeMoves interim housing programs moved into permanent housing. 94% of LifeMoves clients who secured a permanent home in FY25 stayed there for at least 12 months; broken down by household type, 96% of families/couple's clients and 90% of single adults who moved into a permanent home stayed there for at least 12 months. Outcomes are tracked through HMIS and internal data systems and are reviewed regularly to ensure accountability, continuous quality improvement, and alignment with Continuum of Care performance benchmarks. LifeMoves approach to case management and supportive service provision emphasizes dignity and respect, relentless engagement, and multi-disciplinary collaboration when working with all members of the household. LifeMoves believes engagement should always be flexible, client-led, and voluntary, and accordingly, LifeMoves case managers meet clients where they are, offering support through moments of crisis and success while providing consistent, steady guidance through moments of success. This philosophy is reflected in everything from informal check-ins to being consistently available and responsive when clients reach out. LifeMoves practice of relentless engagement means celebrating every win no matter how small it may seem; embracing a growth mindset; and maintaining a strong, supportive relationship that centers the client's needs and voice. Our staff has significant experience with this model of case management, and we are fully prepared to maintain a ratio of one case manager per 20 households. LifeMoves case managers strive to engage in weekly contact with their clients, and potentially more frequently for higher-acuity clients. LifeMoves supportive services helps people achieve self-sufficiency with a culturally responsive, client-centered service model that addresses the distinct needs of every member of the household. These services interconnect with each other to give clients the tools they need to move out of homelessness and on to success. LifeMoves' 360-degree case management model addresses the myriad challenges that bring people to the doorstep physical

D. Provide your organizational experience working with mental, behavioral, and medical professionals.

Our organization has extensive experience collaborating with mental health, behavioral health, and medical professionals to support clients with complex needs. Program staff regularly coordinate care with licensed clinicians, therapists, psychiatrists, primary care providers, and community health clinics to ensure participants have access to comprehensive, wraparound services. Through ongoing case conferencing, warm handoffs, and referral partnerships, staff work closely with providers to support mental health treatment, substance use services, medication management, and chronic health care needs. All coordination is conducted using a trauma-informed, client-centered approach, with appropriate releases of information in place to protect client confidentiality. These partnerships strengthen service continuity, improve housing stability, and support positive long-term outcomes for the individuals and families we serve. LifeMoves Programs and Services leadership team benefits from the strategic oversight of Eve Stoller (LCSW 80899), Senior Director of Clinical Services and Training. Eve graduated from Columbia University with a master's degree in social work, and prior to that studied psychology and Spanish at UCLA. Since joining LifeMoves in 2017, Eve has significantly contributed to the growth of our supportive services, including education and workshops, children's services, the behavioral health therapist training program, and the MSW student internship program. Behavioral health support services are available to all clients free and on-site at all LifeMoves interim housing sites through our Behavioral Health program. Led by Eve Stoller (introduced above), a team of approximately 20 practicum students provides individual, group, and milieu therapy to clients on-site. The practicum students are either third-year doctoral psychology students or are enrolled in a Master of Social Work (MSW) program. Clients find this "no barriers" program format to work extremely well for them, and to provide critical services to deal with the trauma that many, if not most, unhoused individuals have experienced. In addition to providing this vital support to the individuals and families we serve, our Behavioral Health program annually

E. Provide your organizational experience working with HMIS & VI-SPDAT coordinated entry procedures. Do any staff have training to conduct VI-SPDAT assessments?

LifeMoves has extensive experience working with the Homeless Management Information System (HMIS) and the Coordinated Entry System (CES) in Santa Clara County (SCC), collaborating with both systems since their onset. All case management and specialist staff have SCC Clarity/HMIS training, including training to conduct VI-SPDAT assessments and renew trainings as required by SCC Bitfocus, the county's HMIS administrator. Program staff connect clients in need of shelter via CES to the Here4You Shelter Hotline operated by Bill Wilson in Santa Clara County, consistent and timely data entry in HMIS, VI-SPDAT assessment reviews, monitoring, and compliance with local Continuum of Care requirements. The LifeMoves Grants, Contracts, and Compliance team support program directors and direct service staff by consistently running different HMIS and VI-SPDAT reports available in the HMIS system to ensure all clients' assessments are active in the community queue and that release of information documents stay up to date. Case managers and housing and employment specialists staff regularly use HMIS to document client demographics, services, referrals, and housing outcomes, ensuring timely and accurate data to support coordinated care and system-wide planning. We actively participate in CES procedures and collaborate closely with CES partners to prioritize households for housing resources. Multiple staff are trained and authorized to conduct VI-SPDAT assessments in accordance with local (CE) protocols. Assessments are completed using a trauma-informed, client-centered approach, and staff receive initial and ongoing training on VI-SPDAT administration, HMIS data quality standards, confidentiality, and coordinated entry policies to ensure consistency and compliance with current best practices.

F. Provide your organizational experience with networks and local collaborative efforts.

LifeMoves has extensive experience participating in local networks and collaborative efforts to support a coordinated and effective response to homelessness. The organization works closely with Santa Clara County's Office of Supportive (OSH) Housing when requesting and reviewing referrals for LifeMoves programs and participates in regular coordination with county partners to ensure timely access to housing resources. LifeMoves also engages in monthly meetings with OSH and other SPN providers, where shared agendas guide discussion on program updates, system challenges, and emerging best practices. These meetings create a consistent forum for collaboration, peer learning, and problem-solving, allowing providers to identify what is working well, address barriers, and improve service delivery across the system. LifeMoves actively participates in both San Mateo County and Santa Clara County Continuum of Care (CoC), LifeMoves partners with county and municipal agencies, CoC lead entities, and nonprofit service providers to support a coordinated system of care. Aubrey Merriman, the CEO of LifeMoves, sits on the Board of Directors of the SCC CoC. Through his and LifeMoves' participation, the agency contributes to and utilizes CES to ensure equitable access to housing resources and prioritize households with the highest needs. LifeMoves' Community Housing Department actively participates in the Service Provider Network (SPN), which is an email group for people working on behalf of those experiencing or at risk of homelessness in the community to network, share and seek resources for clients, and receive updates on CoC related events and opportunities. Lastly, LifeMoves is an expert user of Santa Clara County HMIS to track client engagement, service delivery, and housing outcomes, supporting system-level performance measurement, transparency, and continuous quality improvement. These collaborative efforts are critical to reducing duplication of services, improving referral efficiency, and ensuring that limited housing resources are used effectively. By working in close partnership with system stakeholders and aligning programs with CoC and HUD requirements, LifeMoves helps create clear, coordinated pathways from homelessness to stable housing ultimately resulting in faster placements, stronger outcomes, and more

G. Provide your organizational experience operating a TBRA or similar program.

- Provide the length program,
- Program structure,
- Program achievements
- Program struggles,
- If the program is current. If not, explain why.
- Monitoring history and results of the program

LifeMoves recent experience operating a similar program to TBRA in the current fiscal year (FY26) is operating two similar 'Rapid Re-Housing (RRH) programs, including one with the City of San Jose (with a variety of funding sources throughout the years) and the other with the City of San Mateo (with Permanent Local Housing Allocation (PLHA) funds). LifeMoves worked with the City of San Jose on rapid re-housing initiatives since FY21 through FY26 and implemented many program improvements and quality assurance systems to the rapid re-housing program over the years it was in operation. The City of San Jose program recently sunset in December 2025 due to a shift in funding priorities for homeless and housing programs for 2026. The LifeMoves City of San Jose RRH program was very successful over the years. Beginning in FY21, contractual outcomes such as 'the percent of housed program participants who are enrolled in health insurance' averaged 89%, 'the percent of program participants who maintain housing for six months after graduation' was 100%, 'the percent of housed clients who monthly income is greater than or equal to the living wage at exit' averaged 28%, and other outcomes were consistently met or exceeded. The project provided comprehensive activities and services to support the total number of clients served, with notable milestones achieved. Case managers actively assisted clients in accessing employment resources, including job placement support, skill development, and connections to job training programs. Case managers also supported clients in applying for disability benefits, guiding them through each step of the application process. LifeMoves vast experience in intensive case management, rapport with landlords, and knowledge of local resources ensure households stay housed. The Community Housing team is equipped to assist in landlord mediation and supporting households in responsible tenancy. These achievements mark meaningful progress toward clients individual goals and demonstrate the effectiveness of the programs tailored

H. Provide your organizational experience managing grant funds. Be sure to include policies and internal reviews.

LifeMoves ensures compliance with all applicable federal, state, and local requirements, including HUD regulations outlined in Playing by the Rules, through its Policies and Procedures Manual and established internal control framework. The organization maintains standardized documentation protocols, defined data entry timelines, record-retention standards, and recurring internal audits and Quality Assurance reviews to ensure regulatory accuracy and program integrity. In addition, LifeMoves has extensive experience managing grant funds, including CDBG, ESG, CoC, and private foundation awards. Each grant is assigned a unique project code in NetSuite to track expenditures, and all transactions are reviewed for accuracy and alignment with approved budgets. The Finance Department conducts monthly budget-to-actual reviews, and program managers approve expenses according to internal controls. Grants undergo annual independent audits and are monitored internally through periodic compliance reviews, ensuring that all grant funds are properly documented, reported, and spent in accordance with funder requirements. The agency's Compliance team, led by Data and Compliance Manager Rafaela Ruiz and supported by two Data Compliance Analysts, monitors adherence to policies and ensures grant reporting accuracy. Rafaela brings extensive experience in highly regulated environments and nonprofit compliance oversight, strengthening LifeMoves' ability to manage complex grant requirements while maintaining data integrity and program

I. Identify agency personnel who will be directly involved in implementing the TBRA program. Describe all relevant experiences of each individual.

Alexandra Rosas provides strategic and operational leadership for complex housing programs, bringing extensive experience overseeing multidisciplinary teams across Rapid Re-Housing, Permanent Supportive Housing, Re-Entry, Below Market Rate, Transitional Housing, and privately funded initiatives. As the bilingual (English/Spanish) Associate Director of Community Housing, she is responsible for staff supervision, fiscal oversight, program performance, and full compliance with public and private funding requirements. Her professional background spans frontline service through senior management, including direct housing navigation experience, giving her a deep understanding of program operations, performance management, and cross-system coordination. Alexandra's academic background in Sociology further strengthens her ability to lead trauma-informed, client-centered programs while navigating complex housing systems to achieve measurable and sustainable housing outcomes. Dolores Ruiz is highly qualified to manage a Rapid Re-Housing contract, with nine years of experience delivering and overseeing trauma-informed, client-centered services for vulnerable populations across Bay Area communities. As a bilingual Spanish-speaking public health professional and current Rapid Re-Housing Program Director, she brings demonstrated expertise in housing-focused program management, staff supervision, fiscal oversight of rental assistance, and compliance with funder requirements. Her educational background, including a Bachelor of Arts in Communication Studies with a minor in Criminal Justice, along with certifications as a Community Health Worker, Youth Advocate Specialist, and Reentry Professional, enhances her ability to communicate effectively, support diverse participant

J. Describe your knowledge and experience with available County resources.

LifeMoves has strong knowledge of and experience navigating available county resources to support individuals and families experiencing homelessness. Staff maintain up-to-date familiarity with county-funded programs and systems, including CES, emergency shelter and motel programs, rapid re-housing, permanent supportive housing pathways, behavioral health services, public health clinics, and financial assistance programs. Case managers regularly assist clients in accessing county resources such as CalWORKs, CalFresh, General Assistance, Medi-Cal, Behavioral Health and Recovery Services (BHRS), domestic violence support services, referrals to subsidized childcare, school-based resources, youth wellness, teen engagement, and employment and workforce development programs. LifeMoves staff work closely with county departments and contracted providers to ensure timely referrals, warm handoffs, and continuity of care. This knowledge allows our organization to effectively advocate for clients, reduce barriers to service access, and maximize the use of available county resources to promote housing stability, safety, and self-sufficiency.

K. Describe any large organizational changes that occurred in the last five years. This could include new board members, new staff, new funding, new operational structures, new missions, etc.

Over the past five years, LifeMoves has strengthened its organizational capacity through key leadership, governance, and operational enhancements to better address the region's housing crisis. This includes expanding and diversifying the Board of Directors with five new members bringing expertise in strategy, finance, technology, healthcare, philanthropy, and community advocacy. Board leadership includes executives from major institutions such as Google and Charles Schwab, as well as a former LifeMoves program participant, ensuring strong oversight, strategic direction, and a continued focus on equity and lived experience. During this period, LifeMoves significantly expanded its programmatic footprint through the development and operation of multiple Homekey-funded sites, increasing interim housing capacity across Santa Clara County. These include LifeMoves Mountain View (opened in 2021) with more than 100 units for individuals and families; LifeMoves Branham Lane in San José (opened in early 2025), the city's largest interim housing community with over 200 units; and Homekey Palo Alto, a modular interim housing community with 88 rooms featuring private bathrooms and, in some cases, kitchens. The successful launch and operation of these sites demonstrate LifeMoves' ability to manage complex public funding, oversee large-scale site-based operations, and integrate housing with supportive services while maintaining regulatory and fiscal compliance. LifeMoves strengthened its executive leadership with the appointment of Fred K. Smith as Chief Philanthropy Officer. Fred brings more than 20 years of experience in fundraising and philanthropic strategy and previously served as Interim CPO, where he implemented key development systems and procedural improvements. His background includes senior fundraising leadership roles at Stanford, Northwestern, and Santa Clara University, where he managed large-scale campaigns totaling more than \$500 million. In this role, Fred oversees all fundraising operations and supports the long-term financial sustainability of the organization. LifeMoves further expanded executive capacity with the appointment of Nicholas Hodges as Chief Operating Officer. Nicholas leads core operational functions including program effectiveness, evaluation and learning, human resources, and housing and site operations. He brings more than 20 years of experience scaling nonprofit and philanthropic organizations, most recently as COO at Rockefeller Philanthropy Advisors, where he oversaw global operations across 35 countries. His prior leadership roles at Tides Foundation, Schwab Charitable, and The San Francisco Foundation, along with partnerships with organizations such as the Bill &

[Save and Continue](#)

SECTION 2 - EVIDENCE OF NEED FOR PROJECT

A. In detail, describe your target population and referral sources.

LifeMoves serves individuals and families experiencing homelessness or housing instability, with a primary focus on households who are currently unsheltered, residing in interim shelter, or actively engaged in supportive services. The target population includes households with significant barriers to housing stability, including extremely low incomes, limited access to affordable housing, and ongoing service needs that require coordinated housing and case management support. Referral sources include the local Coordinated Entry System (CES), which prioritizes households based on need and vulnerability. In addition to CES referrals, LifeMoves utilizes an internal referral pathway for individuals and families who are already enrolled in or actively engaged with LifeMoves programs. These internal referrals may include clients residing in interim shelter or those receiving outreach or other supportive services. As long as a household is actively engaging with a LifeMoves staff member and receiving services, they may be referred for consideration. All referred households, whether through CES or internal referral, must complete the full eligibility and approval process prior to enrollment. This dual referral structure allows LifeMoves to prioritize highly engaged clients and create timely pathways from interim shelter or outreach into permanent housing solutions, including Rapid Re-Housing. By serving current clients, LifeMoves is able to reduce barriers to program access, support continuity of care, and increase opportunities for households to transition more quickly into stable housing. Internal data demonstrates the importance of this dual referral model. Between 2020 and 2026, LifeMoves served 238 Sunnyvale residents across multiple programs, including emergency shelter, outreach, motel voucher, prevention, and family shelter services, representing 197 adults and 41 children. Many of these households were engaged across more than one program, highlighting the role of internal referrals in creating housing pathways for current clients. By allowing engaged clients to transition from interim shelter or outreach into Rapid Re-Housing, LifeMoves reduces barriers to access, supports continuity of care, and accelerates progress toward

B. Describe your methodology to secure permanent housing units for the program. Describe any existing relationships with landlords, access to units, and approach to securing housing.

Our program uses a proactive, housing-first methodology to secure permanent housing for participating households when it supports the household's success. The staff in partnership with the client begin housing search activities immediately upon enrollment, working closely with households to identify unit preferences, income parameters, and location needs tied to employment, schools, and support networks. The program maintains established relationships with a range of private market landlords, property managers, and affordable housing providers throughout the county. These relationships have been built over time through consistent communication, reliability, and a strong track record of successful placements. Staff regularly conduct landlord outreach to identify available units, educate property owners about program supports, and address concerns related to screening barriers or rental subsidies. To increase access to units, the program leverages flexible funding sources such as rental subsidies, security deposit assistance, and move-in cost support, reducing financial risk for landlords and improving housing access for families. Case managers provide ongoing support throughout the lease-up process, including application assistance, documentation coordination, and advocacy during tenant screening. Once housed, the program continues landlord engagement and offers post-move-in stabilization support to ensure successful tenancies, mitigate issues early, and promote long-term housing retention. This combination of early housing search, strong landlord partnerships, financial incentives, and ongoing case management allows the program to consistently secure permanent housing outcomes for families served.

C. Describe the methodology your agency uses for intake procedures, assessing service needs, and evaluating barriers to self-sufficiency. Include information on how critical issues such as mental health, physical health, drug abuse or other related conditions are addressed.

Our agency uses a trauma-informed, client-centered approach to intake, assessment, and service planning to support long-term self-sufficiency. Intake includes verification of eligibility, household composition, housing history, income, and immediate safety needs, with all information documented in HMIS and participant rights and confidentiality reviewed. Following intake, case managers assess service needs and barriers related to housing stability, employment and income, benefits access, health, and other stabilizing factors. Identified barriers, such as limited income, prior evictions, credit challenges, or lack of documentation are used to develop an individualized service plan that is reviewed and updated regularly. Critical issues including mental health, physical health, and substance use are addressed using a trauma-informed, harm-reduction approach. Participation in treatment is not a condition of housing. Staff provide referrals to appropriate community-based providers and support participants in accessing care, benefits, and crisis services as needed, while respecting client choice and confidentiality.

D. Describe your methodology to address these service needs and barriers.

Staff provide direct assistance and referrals to address barriers related to income, employment, benefits access, documentation, transportation, childcare, and legal or credit issues. The program leverages flexible financial assistance when available (e.g., application fees, deposits, rental arrears) and provides advocacy with landlords and service systems to resolve barriers that may prevent housing placement or stability. Health-related needs, including mental health, physical health, and substance use concerns, are addressed through a harm-reduction approach and warm referrals to community-based providers. Case managers support participants in navigating services, attending appointments, and coordinating care, without requiring treatment participation as a condition of housing. Progress is monitored through regular check-ins and service plan reviews, allowing staff to respond quickly to emerging challenges and adjust supports as needed to promote long-term housing stability and self-sufficiency.

E. Describe how your agency measures the effectiveness of your case management delivery system. Include information on any improvements and/or adjustments your agency has made in its case management delivery system in the past five years. Why did you make these changes and how have they impacted outcomes?

LifeMoves measures the effectiveness of its case management delivery system through a comprehensive performance management and evaluation framework aligned with the organization's Strategic Plan and informed by the Impact and Learning Department. This framework ensures the organization remains focused on its target population, understands which supports and interventions are most strongly correlated with positive outcomes, and continuously refines program models to improve effectiveness. Over the past five years, LifeMoves has made significant investments in expanding its data infrastructure, analytical capacity, and internal data and compliance teams to strengthen case management effectiveness and support program growth. These improvements were implemented to ensure consistent service delivery as programs scaled, improve real-time decision-making, and create the infrastructure needed to identify and replicate effective practices across sites and service models. Performance management is used not only to monitor outcomes but also to build a culture of learning and accountability across the organization. Case management effectiveness is measured across three core domains of client self-sufficiency: housing stability, income, and health and well-being. Throughout a client's engagement with LifeMoves, staff track progress toward key milestones such as securing and maintaining employment or maximizing benefits, connecting to and sustaining health and behavioral health services, and exiting to permanent or other positive housing destinations. Engagement in case management, completion of necessary documentation, and progress toward individualized goals are monitored to ensure services remain client-centered and responsive. LifeMoves also integrates qualitative measures, including client surveys and ongoing assessments, to capture broader indicators of well-being such as attendance at medical and behavioral health appointments, enrollment in vocational or educational programs, and progress toward personal goals identified through case management. Performance management and evaluation play a direct role in shaping program improvements. For example, analysis conducted by the Impact and Learning Department found that approximately 60 percent of clients who secured permanent housing did so with the support of an ongoing housing subsidy. In response, LifeMoves adjusted its case management and resource allocation strategies to prioritize access to rental assistance and flexible client support, strengthening housing stability and increasing successful permanent housing outcomes.

F. Describe your methodology to measure client progress.

LifeMoves methodology to measure client progress is individualized to each client and their housing and case plan goals. Case managers and housing and employment specialists practice relentless engagement with clients, celebrating successes both small and large. The Sunnyvale TBRA program plans to measure the following outcomes: 1) Housing stability and housing retention 2) Referrals to outside resources and programs 3) Long term self-sufficiency for clients. As stated in the abstract above, the project aims for 85% of participating households to successfully complete their housing lease during the program period and remained permanently housed at the end of their lease term. Also, 85% of households are expected to maintain housing one year post-subsidy support from the TBRA program, demonstrating sustained housing outcomes. To provide perspective, nationally, about one in three clients (32.4%) exiting homeless programs move into permanent housing (source: the HUD exchange); this figure includes all household types (i.e., singles, families) and all interim supportive housing types (i.e., emergency shelter, rapid re-housing, and transitional housing, and includes both congregate and non-congregate spaces).

G. Describe in detail your knowledge and methodology to comply with HOME TBRA requirements and Sunnyvale TBRA guidelines.

Our agency has experience managing federal and local rental assistance programs, including CDBG-funded projects. Staff, board, and volunteers hold relevant certifications and expertise in case management, housing navigation, and grant administration. We have successfully completed similar projects with no compliance findings and maintain strong partnerships with landlords, housing providers, and community agencies, ensuring efficient access to units and participant support. We are client-centered and housing-first. Staff secure permanent housing through landlord partnerships, outreach, and flexible subsidies, ensuring rent reasonableness and HQS compliance. Intake verifies eligibility, household needs, and income, with ongoing recertifications documented in HMIS and our internal data base. Case managers address barriers, including health and behavioral health needs, using a harm-reduction approach, while tracking progress through individualized service plans. All activities will comply with HOME TBRA and City of Sunnyvale guidelines.

[Save and Continue](#)

SECTION 3 - STATEMENT OF WORK/PROJECT SCOPE/READINESS

A. Budget

Provide an itemized budget for each funding source. HOME funds are used for rent subsidies, security deposits, and utility allowances based on the Santa Clara County Housing Authority schedule located at <https://www.scchousingauthority.org/section-8/payment-standards-2024>.

HOME Funding (not to exceed \$1,000,000 per year)				
Line Item	Year 1 Budget		Year 2 Budget	
	HOME Budget	Other Funding Sources	HOME Budget	Other Funding Sources
Rent Subsidies	\$818,255		\$820,000	
Utility Allowances	\$125,945		\$46,500	
Security Deposits	\$55,800		\$75,000	
TOTALS	\$1,000,000	\$0	\$941,500	\$0

Low-Moderate Income funds from the Redevelopment Agency are to be used for supportive services that may include case management, training, counseling, program delivery costs, indirect costs, or other services that compliment the needs of the participants and the TBRA program goals.

Low-Moderate Income Funding (not to exceed \$350,000 per year)					
Line Item		Year 1 Budget		Year 2 Budget	
		Sunnyvale Budget	Other Funding Sources	Sunnyvale Budget	Other Funding Sources
Personnel					
	FTE % Funded	Position Title			
-	32%	Program Director	\$27,023	\$59,733	\$23,680 \$65,679
-	100%	Case Manager	\$59,632	\$0	\$61,421 \$0
-	100%	Case Manager	\$55,440	\$0	\$57,103 \$0
-	100%	Housing/Employment Specialist	\$53,460	\$0	\$55,064 \$0
-	8%	Associate Director of Housing	\$7,961	\$87,549	\$6,248 \$92,127
-	0%		\$0	\$0	\$0 \$0
Personnel Benefits			\$83,442	\$60,386	\$83,442 \$64,700
Non-Personnel					
Direct Client Assistance			\$14,490		\$14,490
Staff Training & Travel			\$2,900		\$2,900
Program Supplies			\$0		\$0
Indirect Costs (De minimis as high as 15% of direct costs)			\$45,652		\$45,652
TOTALS			\$350,000	\$207,668	\$350,000 \$222,506

B. Provide a narrative of budget items

Line Item	Description
Rent Subsidies	Funds support short- and medium-term TBRA rental assistance for individuals and families, helping them secure and maintain permanent housing of their choice. Subsidies reduce housing cost burden, prevent returns to homelessness, and are paired with housing navigation and tenant stabilization services to promote long-term housing retention and
Utility Allowances	Utility assistance helps cover essential household utilities such as electricity, gas, and water during the transition to permanent housing. This support ensures units remain habitable and prevents housing instability due to unpaid utility costs.
Security Deposits	Security deposits are provided to remove a common barrier to housing access for low-income households. Assistance enables participants to secure housing more quickly and compete in tight rental markets.
Housing Staff Salaries & Benefits	Funds support housing-focused staff who provide TBRA lease-up assistance, landlord outreach, unit identification, housing navigation, and tenant stabilization, ensuring participants secure safe, affordable housing and maintain long-term housing stability.
Case Management Staff Salaries & Benefits	Case management staff provide individualized support services, including housing stability planning, employment and income support, benefits enrollment, and referrals to community resources. Ongoing case management helps participants maintain housing and improve overall
Program Manager Salary & Benefits	The Program Manager oversees program operations, staff supervision, compliance with funder requirements, data quality, and outcomes reporting. This role ensures services are delivered effectively and in alignment with program goals.
Direct Client Assistance	Direct assistance includes flexible funds to address urgent participant needs such as transportation, basic household items, move-in supplies, or emergency expenses that could otherwise jeopardize housing stability.
Staff Training & Travel	Funds support local travel necessary for home visits, landlord meetings, and coordinated entry participation.
Program Supplies	N/A
Indirect Costs	Indirect costs support essential administrative functions such as finance, human resources, information technology, facilities, and organizational infrastructure that enable the program to operate effectively.

C. Provide a description of how many households will be served annually was calculated

The projected number of households served annually was developed using Tenant-Based Rental Assistance (TBRA) program standards, Rapid Re-Housing best practices, and local housing market conditions. The program is designed to serve approximately 31 households per year, based on staffing capacity, anticipated length of TBRA enrollment, and the level of rental and move-in assistance required in a high-cost housing market. Household projections include approximately 11 individual households, 14 families of three, and 6 families of five. These projections are informed by historical enrollment patterns, household composition trends, and demonstrated demand for flexible, tenant-based subsidies. Assistance is structured to allow households to access units of their choice within the local rental market, consistent with TBRA requirements. TBRA subsidy determinations are based on household income, typically ranging between 30–50% of Area Median Income (AMI), and are calculated to ensure housing costs remain affordable while complying with TBRA rent reasonableness and habitability standards. Assistance is time-limited and paired with housing navigation and stabilization services to support long-term housing retention. Based on these assumptions, the program is projected to provide TBRA and related move-in assistance to approximately 31 households annually, or 62 households over the two-year grant period. This approach aligns with TBRA program goals by promoting housing choice, reducing barriers to market-rate units, and supporting sustained housing stability while maintaining program capacity.

D. List all other funding sources and if funding will be used for the TBRA program.

Funding Source	Amount (Estimated)	Used for TBRA (Y/N)	Other Notes
Various	\$125,086	N	Other grants will cover the rest of the Associate Director and Program Director salaries.

[Save and Continue](#)

E. Describe the commitment level of all funding sources listed

None of the funding for the LifeMoves Sunnyvale TBRA program is guaranteed. LifeMoves would not necessarily operate the program without available funding.

F. If applicable, describe the types of in-kind services to be dedicated to the program and their approximate value.

N/A - no in-kind services will be dedicated to the program.

G. Describe the organization's financial management practices, including financial reporting, payment procedures, audit history, regulatory compliance, and budgeting practices.

LifeMoves maintains strong financial management practices to ensure accountability, transparency, and compliance with all funding requirements. The organization uses NetSuite and PayCom software, both designed for non-profits to track grants as separate cost objectives. Once a grant is awarded and a contract executed, the Finance Department assigns a unique project code. All transactions for that grant are coded to this project number, and unrelated transactions are excluded. Financial data is tracked and reported by project, ensuring accurate accounting of revenue and expenses, including CDBG funds. LifeMoves has a payment and disbursement procedure managed by the Controller. Program Managers and senior leadership may approve check requests, subject to Finance Department oversight. Expenses are reviewed against the budget monthly, and any deviations are examined for accuracy and appropriateness. All checks over \$25,000 require dual signatures, typically from the Finance Department and/or the CEO. LifeMoves undergoes an independent audit annually to ensure compliance with GAAP and the US Office of Management and Budget Circular A-133. The Audit Committee, a subcommittee of the Board of Directors, is responsible for hiring and retaining independent auditors and approving the engagement letter. The CFO/Controller coordinates audit planning with the auditors, and a preliminary draft is reviewed by the Audit Committee, CFO, and CEO before submission to the Finance Committee. The Audit Committee meets with auditors at the conclusion of the audit to discuss findings, evaluate the process, and plan improvements for the following year. The organization maintains compliance with all applicable federal, state, and local regulations. Annual budgets are developed collaboratively by program and finance staff, reviewed by senior leadership and the Board, and monitored throughout the year to ensure expenditures align with

H. Calculate the financial ratios below using most recent audited financial statements

	Ratio #1 - Current Ratio		Ratio #2 - Debt Ratio		Ratio #3 - Program Expense Ratio	
1	Current Assets	\$68,437,759	Total Liabilities	\$26,276,349	Program Services Expenses	\$53,627,474
2	Current Liabilities	\$15,340,495	Total Assets	\$185,946,187	Total Expenses	\$69,566,970
	Current Ratio	4.46%	Debt Ratio	7.08%	Program Exp Ratio	0.77%

Attachments

[\(Upload Instructions\)](#)

Please provide supporting document attachments below. Several attachments are REQUIRED by all applicants in order to submit your application, and your application WILL NOT be able to be submitted with missing attachments! There are several additional attachments that are REQUIRED depending on if the project is related to developing affordable housing. Please take this into consideration when timing your submission of this application. The documents you need to upload are checked below. If you have other attachments you would like to include, please check one of the Other boxes below and identify the Attachment in the box. If you are unable to upload any of the attachments, contact the CDBG Manager of the appropriate jurisdiction at least one day prior to submitting your application.

- Signature Authorization [1. Signature Authority - LifeMoves Board Resolution 2025.pdf](#)
- CHDO or CDBO Verification [2. CHDO and CDBO Not Applicable.docx](#)
- Bylaws [3. LifeMoves By-Laws 2025.pdf](#)
- Articles of Incorporation [4. LifeMoves - Articles of Incorporation.pdf](#)
- 501(c) (3) documentation from IRS Organizational Chart [5. LifeMoves-501c Tax Exempt Status.pdf](#)
- Project Organizational Chart [6. Org Chart -Rapid Re-Housing - January 2026.pptx](#)
- Financial Audit [7. LifeMoves 2024 - FS Final.pdf](#)

- Most Recent Financial Audit
- Director's and Officer's Liability & Errors and Omissions Insurance
- Language Access Plan and (ADA) Accessibility Policy
- Job Descriptions and Resumes

- [8. LifeMoves 2025 - FS Final 6122.pdf](#)
- [9.i.City_of_Sunnyvale_LifeMoves_25-26_GL_Auto_Umb_5M_W_7-10-2025_612043453.pdf](#)
- [9.ii.Evidence_of_Insurance_LifeMoves_25-26_DO_2-7-2026_1259161769.pdf](#)
- [10.i. Language_Access_Plan.docx.pdf](#)
- [10.ii. Non_Discrimination - Staff - Equal_Employment_Opportunity_EEO - Employee_Handbook_2025.docx](#)
- [10.iii. Non-Discrimination - Notice_for_Clients - 2025.docx](#)
- [11.iv.JD-RRHCM2.5.26.docx](#)
- [11.v.JD-RRHSpec2.5.26.docx](#)
- [11.i. Alex_Rosas_Resume_2026 - Associate_Director.pdf](#)
- [11.ii. Dolores_Ruiz_Resume_2026 - Program_Director.pdf](#)

(Your application will be saved)

Application Submitted by: Alexandra Fabbiani Date: 02/09/2026

Reviewed and accepted by City of Sunnyvale:
Sign Here:
Accepted status

Click above to return application to Draft status, and please enter a reason in the box below