

**Capital and Affordable Housing Projects Funding Application**  
**City of Sunnyvale**  
**FY 2024/2025 and 2025/2026**  
**Community Development Block Grant (CDBG)**

**Applicant Information**

Legal Name of Organization:	WeeCare, Inc. (DBA Upwards)		
Mailing Address:	5521 N University Drive	City: Coral Springs, CA	Zip: 33067
Website:	upwards.com		
Contact Person:	Kat Fuentes	Title:	Community Impact Senior Manager
Contact Email:	kat@upwards.com	Telephone:	626-722-7995
Executive Director:	Jessica Chang	Email:	jessica@upwards.com
Agency Type:	Other Type of Organization Describe: For-Profit		
SAM Number:	HRBLHQGMG4T5		

**PROGRAM OVERVIEW**

Project Name:	BOOST (Business Operation & Optimization Support Tools)		
Project Address:	35 locations	City: Sunnyvale	Zip: 94087

**Select an Application:**  
**Capital and Affordable Housing Projects Funding**

**Loan Request**

Requested Amount	\$280,000
Other Funding Sources	\$0
Total Project Cost	\$280,000
Percentage of City of Sunnyvale funds toward Total Project Cost	100%

**Brief Project Description:**

The Upwards' BOOST Program offers personalized business and technical support to small, in-home daycare providers. It focuses on those with under 5 employees, catering to children aged 0-5 and providing before and after school care up to age 13. Over 12 months, BOOST coaches providers, equipping them with digital tools and professional guidance to build sustainable operations. The program aims to enhance economic opportunities for childcare entrepreneurs, enabling efficient facility management and growth. Services include marketing, enrollment automation, attendance tracking, billing, and curriculum management, crucial for supporting low to moderate-income families and creating jobs in the childcare sector.

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
<b>Program Contact</b> Someone who works with the project on a daily basis, and can answer questions	Judy Ahumada	Program Director	(323) 421-7479	judy@upwards.com
<b>Finance Contact</b>	Johnny Chan	CFO	(323) 421-7479	johnny@upwards.com
<b>Application Contact</b> Person who wrote this application	Kat Fuentes	Community Impact Senior Manager	626-722-7995	kat@upwards.com
<b>Authorized Contact</b> Person authorized to make	Jessa Santangelo	VP Business Development	(310) 710-2833	jessa.c@upwards.com

commitments on behalf of the organization				
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## 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
- CBDO qualifications, if applying for a CBDO activity (See CFR 570.204)

Provide a project-specific organizational chart as an attachment to all copies of the proposal in Tab D and one copy only of the organizational chart for the entire agency in the original application (Tab E).

Upwards is a tech-powered childcare marketplace founded in 2017 with the mission to solve care for good by making childcare accessible to all families while enabling caregivers to thrive. We have over 5 years of experience connecting families with licensed home-based childcare providers across all 50 states.

Our proposed project, the BOOST Program, provides 12 months of personalized business and technical support to local licensed family childcare facilities operated by low- and very low-income microenterprise owners. We have successfully run similar programs supporting small business childcare providers through funding from the Community Development Block Grant (CDBG) over the past 2 years in multiple cities across California, Florida, and Washington.

The BOOST Program is overseen by our dedicated government partnerships division, which has collectively overseen \$15 million in CDBG and government contracts since 2021. Our team has extensive experience managing federally funded programs and meeting rigorous reporting requirements related to income eligibility, population tracking, expenditure documentation, and more.

Key personnel include:

Judy Ahumada, Program Director: Extensive experience managing government-funded childcare initiatives  
 Jessa Santangelo, VP Business Development: Extensive community and government partnership experience  
 Starlynn Perez, Child Care Specialist: Extensive child care industry experience

With nearly 100 full-time staff operating nationally and over \$6 million in 2022 revenue, Upwards has the financial capacity and operational infrastructure to effectively administer the proposed 12-month BOOST Program. We utilize robust systems for participant tracking, results measurement, and fiscal oversight ensuring proper stewardship of public funds.

In summary, Upwards combines substantial organizational expertise running community-based programs supporting childcare providers and families with a sound financial position and commitment to transparency and accountability. We are confident in our ability to successfully deliver on the proposed project goals.

### B. Previous experience using federal funds:

1. Does your organization have previous experience with capital projects involving federal funds? **Yes**

2. How many years of previous experience do you have with federally funded projects? **3**

Briefly describe your experience below:

Upwards has over 5 years of experience managing federally-funded programs and working with government partners at the federal, state, and local levels.

At the State level, Upwards is contracted with California to administer childcare subsidies to income-eligible families.

This is funded through the Child Care and Development Block Grant (CCDBG). Upwards was awarded \$2.065 million to provide direct tuition subsidies. Through our program, WeeSubsidy, Upwards expands access to quality childcare services in areas experiencing significant shortages. The program is designed to support high-need, low-income families, especially those facing a great housing instability risk. WeeSubsidy aims to establish a modern approach to an antiquated subsidy system to increase access to the most vulnerable families, making childcare truly more equitable.

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? **No**

### C. Previous Experience with City-funded projects

#### 1. Do you have previous experience with City-funded projects? Yes

Describe:

Upwards has extensive experience working with government partners and administering federal funds. We operate Federal, State, and Local programs and have become very familiar with government compliance, monitoring, and reporting requirements. On the Local level, this year Upwards is running its community program, BOOST, for various cities and counties across the country in California, Florida, Washington, and more.

BOOST is designed to provide free business support services and tools to low-to-moderate income microenterprise childcare providers. Funded by the Community Development Block Grant (CDBG), this program treats providers as the small business owners they are. It equips them with essential digital tools to make their operations more efficient and helps them learn how to run a sustainable operation. The goals are to empower these microenterprise businesses to reach their full revenue potential, stabilize their jobs in the childcare industry, and create new childcare jobs – all of which lead to more robust childcare services for the local communities.

Upwards piloted this program in 2022 in Cathedral City, CA, and is thrilled its success has led to more municipalities adopting the program for their residents.

CDBG Case Study: During the 2021-2022 program year, Upwards worked with Cathedral City, CA, as a sub-recipient of Community Development Block Grant (CDBG) funding to implement programs to benefit low-to-moderate income (LMI) clientele. These programs were BOOST (business support for daycare providers), CASE (childcare benefits for small enterprises), and Back2Work (tuition assistance for unemployed families seeking work). The total project budget amount for the first program year was \$275,690, and all programs were completed successfully. In summary, the BOOST program assisted 40 LMI daycare Providers and 232 LMI families, the CASE Program assisted 205 employers and 1,416 LMI families, and the Back2Work Program assisted 15 unemployed LMI parents. In total, Upwards assisted 1,703 LMI persons with the \$138,500 CDBG funds, equaling \$81.32/LMI person assisted.

We are committed to assisting all families, especially LMI families facing housing or employment instability, by providing safe and reliable childcare options. Upwards's experience in successfully implementing pilot-to-large-scale projects and meeting federal reporting requirements has strengthened its position in the Early Care and Education (ECE) field. It has also invigorated our leadership to find innovative ways to apply the latest technology to long-standing challenges in childcare.

#### 2. Has your organization received HUD funds previously from the City of Sunnyvale? No

5. Describe your experience managing similar projects funded by other public sources (state, federal, other local government). Upwards has over 5 years of experience managing federally-funded programs and working with government partners at the federal, state, and local levels.

At the State level, Upwards is contracted with California to administer childcare subsidies to income-eligible families. This is funded through the Child Care and Development Block Grant (CCDBG). Upwards was awarded \$2.065 million to provide direct tuition subsidies. Through our program, WeeSubsidy, Upwards expands access to quality childcare services in areas experiencing significant shortages. The program is designed to support high-need, low-income families, especially those facing a great housing instability risk. WeeSubsidy aims to establish a modern approach to an antiquated subsidy system to increase access to the most vulnerable families, making childcare truly more equitable.

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.

Board Member Name	Sunnyvale Resident	Employer (if any)	Office Held on Board	Term of Office (Beginning and Ending years)	Length of Service
Jessica Chang	No	Upwards CEO	Chair	2017-Present	6
Jesse Forrest		Upwards CTO	Member	2017-Present	6
Anna Barber		Partner at M13	Member	2017-Present	6
Richard Kerby		Partner Equal Ventures	Member	2017-Present	6

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 program is limited to a specific target population, microenterprise daycare owners, and documentation of their income is recorded to ensure at least 51% of participants meet the income threshold. The household size and annual income of each program participant are documented in the application they are required to fill out. Upon intake, income is determined by self-certification by all participants. Source documentation like a W2 and/or bank statements will be collected from participants as suggested by HUD's CDBG guidelines. We require at least 51% of participants qualify as LMI, however we anticipate 100% of participants will have income qualifying income.

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
35	35	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 project's design will meet the needs you have described, and how it will achieve the Consolidated Plan goals you identified in Section 2, Part 1.

In Sunnyvale, the need for early childhood care and education is highlighted by the presence of over 10,324 children under the age of 5, a critical period for child development. The importance of early care in promoting brain development, social skills, school readiness, and long-term outcomes such as health and employment is underscored by organizations like the Annie E. Casey Foundation and UNESCO. These entities assert that early care is fundamental not only for preparation for primary school but also for lifelong emotional well-being and learning. The local demographic data reveals that there are approximately 5,982 households with a child under 6 years old, indicating a significant demand for childcare services. This need is particularly acute for the 1,483 children living with a single parent in Sunnyvale, as reliable childcare is crucial for these families' survival and housing stability.

The economic implications of the lack of childcare are profound. Many parents, especially single mothers, depend on childcare to join or rejoin the workforce. The absence of affordable childcare options can lead to increased social inequities and hinder local economic recovery. Childcare expenses account for almost 20% of a family's income in Sunnyvale, placing a considerable financial burden on families and impacting housing affordability and

economic mobility.

The project targets low- and very low-income microenterprise owners who run licensed childcare facilities, primarily female-run and minority-owned businesses. These childcare providers, with an average income of about \$38,147.2 a year, play a vital role in neighborhood revitalization efforts. The BOOST program, part of this project, selects participants based on High-Risk/ High Need Assessments, focusing on factors like income, housing ownership, race/ethnicity, and the needs of the area served, including populations of single-headed households and schools with high participation in free or reduced-lunch programs.

This proposed capital project is designed to address the gap in quality, affordable childcare, especially in disadvantaged communities. By supporting childcare microenterprises, the project not only aids in the provision of essential early care but also aligns with the Consolidated Plan Goal D: Expanding Economic Opportunities. This initiative aims to enhance the economic and social well-being of families in Sunnyvale, contributing to the community's holistic development and economic growth.

#### **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.

Funding Source	Amount	Status as of Jan. 16, 2023*	Award Date
Total	\$0		

\*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".

B. 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 organization's 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.

N/A - no site

### **SECTION 3: STATEMENT OF WORK/PROJECT SCOPE**

#### **Part 1 - Project Location and Service Area**

Provide the street address and assessor's parcel number(s) of the project location.

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.

35 locations throughout the City of Sunnyvale. The service area will be confined to daycares located within the city's boundaries. Upwards' services are conducted remotely and are available to daycare providers and families 24 hours a day, 7 days a week. Each of the direct program participants operate their daycare from their home. Therefore, the services they provide will happen all throughout the city during their operating hours. The locations of the daycares are private residences and, therefore, treated as confidential information. If BOOST is selected to receive CDBG funds, the exact locations of each daycare provider who participates will be disclosed.

#### **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:

- Predevelopment milestones (design, permitting, securing matching funds)
- 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.

Predevelopment Milestones

Curriculum Development: We will utilize a specialized business and technical training curriculum tailored specifically for childcare providers. This curriculum focuses on enhancing the skills and knowledge essential for running a successful childcare business.

Technology Integration: Updating software customizations to enable real-time impact tracking will be a critical milestone. This technology allows for efficient monitoring and management of the program's progress and impact on the community.

Client Recruitment/Program Marketing Plan

Leveraging Networks: We will utilize existing relationships within the childcare provider network for participant recruitment, ensuring we reach those most in need of our services.

Marketing Campaign: A comprehensive, multilingual digital and print marketing campaign will be executed. This campaign will feature custom audience targeting to ensure we effectively communicate our message to the diverse Sunnyvale community.

Community Engagement: Canvassing local community organizations will be vital in promoting the available assistance. This approach ensures grassroots-level engagement and awareness about the program.

Intake & Screening

Eligibility Assessment: Childcare providers interested in participating in the program will be required to document household size and income via eligibility forms. This step ensures we assist those who meet the defined criteria.

Verification Process: We will conduct a thorough verification process that includes checking active childcare licenses, conducting background checks, and collecting inspection reports. This ensures that all participating providers meet the necessary standards and regulations.

Evaluation Plan

Baseline Data Collection: Gathering baseline data on provider business operations, such as revenue, jobs, and capacity. This data will serve as a reference point for measuring progress.

Continuous Monitoring: Progress will be continuously compared to benchmarks through a centralized database, allowing for real-time tracking and adjustments as needed.

Feedback and Analysis: Post-program surveys will be administered, and insights will be combined with utilization analytics to gauge the return on investment (ROI). This feedback will be integral to understanding the program's effectiveness and areas for improvement.

Strategy Adjustments: Strategies will be adjusted in response to any shortfalls in equitable access or result targets. This ensures the program remains effective and relevant to the community's needs.

By implementing this comprehensive work plan, our project aims to significantly enhance the quality and availability of childcare services in Sunnyvale. Through a combination of skilled personnel, targeted outreach, rigorous evaluation, and continuous improvement, we are committed to making a positive impact on local childcare providers and, by extension, the families they serve.

B. Implementation Schedule

Milestone	Target Date
1. Contract Start Date	07/01/2024
2. Design and Permitting	
3. Initiation of Construction/Project	07/01/2024
4. Completion of Construction/Project	06/30/2024
5. 50% of Funds Expended and Drawn	12/01/2024
6. 100% of Funds Expended and Drawn	06/30/2025
7. Project Completion and Reporting	06/30/2025

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

1. CDBG/HOME OBJECTIVE	2. CDBG/HOME OUTCOME
Creating Economic Opportunities	Sustainability

**D. 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
Low Income (50%-80% AMI)	5	0	5
Very Low Income (<50% AMI)	30	0	30
Disabled Persons		0	0
Female-Headed Households		0	0
Elderly		0	0
Youth		0	0
Homeless Persons		0	0
Other Special Needs		0	0

### Part 3 - Construction Project Description

**A.** Does your project involve:

Acquisition? No

New construction? No

Major rehabilitation?\* No

Minor rehabilitation? 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? No

Explain *how* you intend to secure site control prior to the start of this project. Include the anticipated acquisition date(s). N/A

### C. Operating Funds:

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

Provide 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)? No

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

**E.** 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

N/A

**F.** Attach the following items as attachments to this application

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



## G. Community Involvement

For new construction or facility/housing expansion projects, include evidence of community support for the proposed project. Describe the measures your organization has taken to garner community support in the space below. Provide evidence of contact with local neighborhood association(s) or proof of public hearing. **Include letters of support as attachments to this application**

N/A

## **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. List the sources of funding.

#### Non-Personnel Costs:

Training Materials (\$19,142) - Development and delivery costs for business operation trainings.

Equipment (\$12,761) - Technology and other program supplies.

Marketing for Providers (\$15,393) - Flyers, ads, translations to promote the program and raise provider enrollment.

Marketing for Families (\$3,190) - Activities to make families aware of open slots at participating providers.

Cost of Payments (\$14,783) - Platform subscription and payment processing fees.

Technology Cost (\$1,995) - Software and data analytics tools.

Office Supplies (\$650) - Basic supplies like paper, pens and other operational incidentals.

The full \$280,000 budget for the 12-month BOOST Program is requested from CDBG funds. The allocation covers partial staffing, operational expenses, resources, and services for providers and families. Upwards' existing infrastructure provides supplementary program support.

The budget focuses on effectively empowering local childcare microenterprises to upgrade their operations sustainably using the knowledge imparted over the year. Our streamlined approach makes the spending reasonable for the scale of assistance and ensuing community-level impact.

#### Personnel Costs:

Salary (\$208,972) - Covers partial salaries for program staff overseeing operations, training, marketing, reporting and other key functions based on typical market rates.

Fringe (\$3,114) - Associated fringe benefit costs for the allocated staff supporting the program.

### **Part 2 - Financial Information**

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

- financial reporting,
- record keeping,
- accounting systems,
- payment procedures, and
- audit history, and
- compliance with OMB Circulars and GAAP

#### Financial Reporting and Record-keeping

Monthly Financial Statements: We prepare and review monthly financial statements that compare budgeted figures with actual expenditures. This practice allows for continuous monitoring and fiscal control.

Accounting Software: To maintain accuracy in financial reporting, we utilize advanced accounting software. This technology aids in ensuring data integrity and facilitates real-time financial analysis.

Record Retention: Our accounting records are meticulously maintained and retained for a minimum of seven years, adhering to best practices and regulatory requirements.

#### Accounting Systems and Payment Procedures

Enterprise Resource Planning (ERP) System: Our robust ERP system includes automated controls for Accounts Receivable (AR), Accounts Payable (AP), and financial reporting. This system streamlines financial processes and enhances data accuracy.



Expense Reimbursement and Invoice Policies: We have clearly documented policies for expense reimbursements and invoice payments, ensuring transparent and standardized procedures.

Compliant Payment Verification: Before executing any payments, we conduct thorough verification processes to ensure compliance and prevent errors or fraud.

Adherence to GAAP Standards: Our financial statements are prepared in accordance with Generally Accepted Accounting Principles (GAAP), ensuring high standards of financial reporting.

CFR Grant Compliance: Dedicated staff members are tasked with ensuring compliance with the Code of Federal Regulations (CFR) for grant management, showcasing our commitment to adhering to federal regulations.

#### Overall Financial Stewardship

With over \$15 million in government contracts secured since 2021, our organization has consistently demonstrated responsible fiscal stewardship. We maintain strict controls aligned with federal regulations, providing stakeholders with confidence in our accountability. Our leadership team is actively involved in overseeing compliance across various funding sources to ensure that our financial practices not only meet but exceed industry standards, thereby maximizing our impact and trustworthiness.

Provide the most recent Board-approved financial audit as an **attachment** to this application.

## B. Budget for Fiscal Year 2023-24

Budget Line Item	Sunnyvale	Other Funds	Matching In-Kind Services or Materials	Program Total
Non-Personnel				
Project Management/Administration				\$0
Permits and Fees				\$0
Design (Architectural & Engineering)				\$0
Acquisition Costs (escrow fees, etc.)				\$0
Other Soft Costs (Monitoring, Surveying, etc.)				\$0
Rehabilitation/Construction Costs (labor, materials)				\$0
Contingency (Construction)				\$0
Environmental Compliance (CEQA/NEPA/Phase 1 etc)				\$0
Construction Management (outside firm)				\$0
Training Materials	\$19,142			\$19,142
Equipment	\$12,761			\$12,761
Marketing for Providers	\$15,393			\$15,393
Marketing for Providers	\$3,190			\$3,190
Cost of Payments	\$14,783			\$14,783
Technology Cost	\$1,995			\$1,995
Office Supplies - Program	\$650			\$650
Personnel - Salary and Fringe	\$212,086			\$212,086
<b>TOTAL</b>	<b>\$280,000</b>	<b>\$0</b>	<b>\$0</b>	<b>\$280,000</b>

## C. Other Funding Sources

Other Funding Sources	
Committed	Amount
Total Committed	\$0
Projected Funding Sources	
Individuals	
Corporate	
Foundations	
In-Kind Services/Materials/Labor	\$0

Total Projected	\$0
Total Other Funding + In-Kind (must match budget above)	\$0

## Attachments

Pro-forma	
Project Service Area Map	<a href="#">City of Sunnyvale Map.png</a>
Project-Specific Organizational Chart	<a href="#">City of Sunnyvale Map.png</a>
Resumes of Applicant's key personnel	
Signature Authorization	<a href="#">City of Sunnyvale - Signature Authorization.pdf</a>
Conflict of Interest Disclosure	<a href="#">City of Sunnyvale - Conflict of Interest.pdf</a>
Environments Review Form	
CHDO or CBDO Verification	
Bylaws	<a href="#">Upwards Good Standing Articles of Incorporation Bylaws 2.pdf</a>
Articles of Incorporation	<a href="#">Upwards Good Standing Articles of Incorporation Bylaws 2.pdf</a>
501(c) (3) documentation from IRS	<a href="#">Upwards IRS 501c3 Tax Exempt Letter 2 2.pdf</a>
Organizational Chart	<a href="#">Upwards BOOST Organization Chart 4.pdf</a> <a href="#">Upwards Org Chart 5.pdf</a>
Financial Audit	<a href="#">Upwards Independent Audit Explanation 9 1.pdf</a>
Letters of Commitment	
Board Resolution authorizing submittal of proposal	<a href="#">Upwards Certification of Authorized Signatory_KatJessa_2.pdf</a>
Language Access Plan and (ADA) Accessibility Policy	<a href="#">Language Access Plan - General.docx.pdf</a>
Appraisal of Property	
Environmental Site Assessment	
Parcel Map	
Property Listing	
Relocation Plan (if project anticipates displacement)	
Letters of Community Support	
Architectural Drawings/Plans	
Other - <input type="text"/>	
Other - <input type="text"/>	

Program Manager Signature      [Kat Fuentes](#)  
Date Signed                      [01/18/2024](#)

**Capital and Affordable Housing Projects Funding Application**  
**City of Sunnyvale**  
**FY 2024/2025 and 2025/2026**  
**Community Development Block Grant (CDBG)**

**Applicant Information**

Legal Name of Organization:	Sunnyvale Community Services		
Mailing Address:	1160 Kern Avenue	City: Sunnyvale, CA	Zip: 94085-3907
Website:	<a href="https://svcommunityservices.org/">https://svcommunityservices.org/</a>		
Contact Person:	Catherine Farry	Title:	Chief Data & Research Officer
Contact Email:	<a href="mailto:cfarry@svcommunityservices.org">cfarry@svcommunityservices.org</a>	Telephone:	408-636-7059
Executive Director:	Marie Bernard	Email:	<a href="mailto:mbernard@svcommunityservices.org">mbernard@svcommunityservices.org</a>
Agency Type:	Non-Profit with 501(c)(3) Status Describe: 0		
SAM Number:	LV2JBL2FB2Z1		

**PROGRAM OVERVIEW**

Project Name:	WorkFirst Sunnyvale		
Project Address:	1160 Kern Ave	City: Sunnyvale	Zip: 94085-3907

**Select an Application:**  
**Capital and Affordable Housing Projects Funding**

**Loan Request**

Requested Amount	\$511,811
Other Funding Sources	\$423,081
Total Project Cost	\$934,892
Percentage of City of Sunnyvale funds toward Total Project Cost	55%

**Brief Project Description:**

Sunnyvale Community Services and Downtown Streets Team operate WorkFirst Sunnyvale, a workforce development program that provides homeless and/or extremely low-income individuals job readiness training, case management and transitional employment opportunities through Streets Team Enterprises (STE).

Objective 1: Employ 15 individuals for 90 days or longer through STE and partners.

Objective 2: Deliver Job Squad (Employment Readiness and Skills) classes to 60 individuals.

Objective 3: Operate a job preparation program for up to 60 people, providing ongoing street cleaning services across City of Sunnyvale.

Objective 4: Offer outreach and supportive services to 60 or more homeless and/or extremely low-income individuals.

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
<b>Program Contact</b> Someone who works with the project on a daily basis, and can answer questions	David Hernandez	Chief Programs Officer	408-738-4321 X2016	<a href="mailto:dhernandez@svcommunityservices.org">dhernandez@svcommunityservices.org</a>
<b>Finance Contact</b>	Carmen Davis	Accounting Manager	408-738-4321 X2008	<a href="mailto:cdavis@svcommunityservices.org">cdavis@svcommunityservices.org</a>

<b>Application Contact</b> Person who wrote this application	Catherine Farry	Chief Data and Research Officer	408-636-7059	cfarry@svcommunityservices.org
<b>Authorized Contact</b> Person authorized to make commitments on behalf of the organization	Marie Bernard	Executive Director	408-738-0121	mbernard@svcommunityservices.org

## **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
- CBDO qualifications, if applying for a CBDO activity (See CFR 570.204)

Provide a project-specific organizational chart as an attachment to all copies of the proposal in Tab D and one copy only of the organizational chart for the entire agency in the original application (Tab E).

WorkFirst Sunnyvale (WFS) is a collaboration between Sunnyvale Community Services (SCS) and Downtown Streets Team (DST). SCS, founded in 1970, provides direct financial aid, food, case management and other emergency support to low-income families. Our mission is to prevent homelessness and hunger in our local community. As part of the Santa Clara County Emergency Assistance Network (EAN), SCS is the sole agency designated to provide emergency aid to low-income Sunnyvale residents. SCS' professional staff have extensive nonprofit experience working with low-income clients.

The mission of DST, which began in Palo Alto in 2005, is to end homelessness through the dignity of work. It employs a nationally recognized "work first" model in which men and women who are homeless or at risk of homelessness participate in a volunteer work experience program as they rebuild skills and receive support in obtaining employment.

DST's Employment Specialists have extensive experience in workforce development and apply a proven structure and model for helping homeless individuals transition back into the workforce. They do this by removing barriers and connecting individuals to services, including access to health insurance and obtaining identification cards.

Both agencies have years of experience in federal grant management, and sound financial reserves and funding sources for our programs and projects. This partnership leverages SCS' fiscal management capabilities and ties to the Sunnyvale business, civic, and faith-based organizations. SCS is fully qualified as a Community Based Development Organization (CBDO) in Sunnyvale.

### **B. Previous experience using federal funds:**

1. Does your organization have previous experience with capital projects involving federal funds? **Yes**

2. How many years of previous experience do you have with federally funded projects? **32**

Briefly describe your experience below:

SCS has managed federally funded CDBG projects for over 30 years and has received EFSP (FEMA) funding for over two decades. We also 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 has 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]).

DST has federal grant management experience in multiple Bay Area counties.

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**

Indicate the actions cited in the space provided below. **SCS did have to return a small amount of Homelessness Prevention and Rapid Re-Housing Program (HPRP) funds in 2011, but we were allowed to use 100% of those returned funds for other eligible grant purposes on the same grant.**

DST has not had to return any funds from any federal projects.

### C. Previous Experience with City-funded projects

1. Do you have previous experience with City-funded projects? **Yes**

Describe:

SCS has received Housing and Human Services grants from the City of Sunnyvale for decades and has consistently been ranked high in competitive grant awards ratings.

2. Has your organization received HUD funds previously from the City of Sunnyvale? **Yes**

Describe:

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.

3. If you are a prior recipient of City of Sunnyvale HUD funds, what was the date of your last City of Sunnyvale monitoring visit? **08/30/2023**

4. Were there any findings and/or concerns identified during your last monitoring visit by the City? **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.

Board Member Name	Sunnyvale Resident	Employer (if any)	Office Held on Board	Term of Office (Beginning and Ending years)	Length of Service
Amal Allan	No	City National Bank		2022-25	2
Mary Bradley	Yes		Secretary	2020-2026	4
Rick Crowley	Yes		Treasurer	2021-2024	3
Travis Duncan	No	DECA Companies		2019-2025	5
Ava Fanucchi	Yes	Sunnyvale Department of Public Safety		2022-2025	2
Michael Gallagher	No	Sunnyvale School District		2019-2025	5
Clayton Grames	No	Intuitive Surgical		2022-2025	2
Jaqui Guzmán	Yes	City of Sunnyvale	Vice President	2020-2026	4
Debbie Klein	Yes			2022-2025	2
José León	Yes	New York Life		2022-2025	2
Margaret Mannion	No	NetApp, Inc.		2018-2024	6
Jeremy Nishihara	No	Sunnyvale School District	President	2018-2024	6
Christian Pellecchia	No	JE Dunn Construction		2019-2022, 2023-2026	4
Benjamin Picard	Yes			2022-2025	2
Elsbeth TeBrake	No			2022-2026	2
Barry Vickrey	Yes			2023-2026	1
Rachel Zlotziver	No	Fremont Union High School District		2022-2025	2

## 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

[Eligibility for WorkFirst Sunnyvale is limited to adults who are homeless, transitioning out of homelessness, or at imminent risk of homelessness. Only those with extremely low to low incomes will be served.](#)

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
60	60	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 project's design will meet the needs you have described, and how it will achieve the Consolidated Plan goals you identified in Section 2, Part 1.

[PROJECT NEED: Both SCS and DST have deep and broad first-hand knowledge of the need for homeless supportive services in Sunnyvale. In FY2022-23, SCS served 770 homeless clients.](#)

[SCS and DST also partner with HomeFirst to service guests at the North County Shelter, supporting their transition to stable housing. DST Team Members may reside at the shelter and former DST Team Members work or volunteer there. DST also offers job readiness and self-sufficiency workshops at the shelter.](#)

[TARGET POPULATION: The target population for WorkFirst Sunnyvale \(WFS\) is unhoused adults who want to find work and obtain stable housing. Primarily, these individuals are graduates of the Sunnyvale Downtown Streets Team. Of the current 19 DST members in Sunnyvale, 7 are men and 12 are women. 17 individuals are aged 18 to 62, and 2 are 63 or older.](#)

[PROJECT DESIGN: SCS has partnered with DST since 2012 to operate the WFS program. Per the City's Consolidated Plan, WFS provides employment development, job search assistance, training, and supportive services to Sunnyvale homeless clients to help them obtain paid employment and permanent housing.](#)

[SCS acts as the fiscal agent for WFS and provides appropriate services to program members—from emergency financial aid and food to benefits enrollment and full case management. DST recruits Team Members and manages the WFS program. Team Members transition to become STE employees \(up to 20 hours a week\), working at the North County Shelter and other locations while receiving case management and employment services.](#)

[DST has a wide network of local employers willing to hire program participants, including:](#)

- [\\*Service By Medallion](#)
- [\\*Taqueria Lopez](#)
- [\\*See's Candies](#)
- [\\*La Plaza](#)
- [\\*Amazon](#)

- \*Savemart
- \*Brightview
- \*Department of Rehabilitation (DOR)
- \*Community Cycles
- \*Elite Hospitality Staffing
- \*Trade Orientation Program
- \*CONXION
- \*Center For Employment Opportunities
- \*San Jose Conservation Corps

One key partner is Our Daily Bread (ODB), a nonprofit that offers hot ready-to-eat meals at St. Thomas Episcopal Church. SCS and DST conduct regular outreach at ODB. DST now has a janitorial contract to clean at ODB, further deepening the cross-program connections in Sunnyvale. DST also partners closely with Helping Hands volunteers who do outreach at encampments throughout Sunnyvale.

Weekly office hours are also held at the Sunnyvale Library for anyone looking for assistance or referrals. SCS community engagement specialists attend weekly DST meetings to connect DST Team Members to community resources and SCS services.

WFS supports Consolidated Plan Goal B: Alleviation of Homelessness and Goal D: Expanding Economic Opportunities by providing homeless and at-risk adults with workforce development activities that enable them to obtain employment. Organization-wide, 1,526 DST Team Members have maintained their employment for 90 days or longer.

Agency wide DST has helped 1,601 homeless individuals secure permanent housing and has removed 24,088 housing barriers (including transportation, IDs, telecommunications, insurance, government benefits) since DST was established. Since launch in Sunnyvale, DST has assisted Sunnyvale Team Members in removing 1,213 barriers to self-sufficiency and assisted in 119 transformations. \$875,387 in employment taxable income for jobs gained through DST have been generated since FY 2017-18.

## 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.

Funding Source	Amount	Status as of Jan. 16, 2023*	Award Date
SCS: Cash for staffing, food and expenses	\$313,721	Pending ▼	07/01/2024
DST: Gift cards for participants attending meetings	\$60,000	Pending ▼	07/01/2024
DST Job Squad Skills workshops	\$8,500	Pending ▼	07/01/2024
DST: Volunteer services	\$8,360	Pending ▼	07/01/2024
SCS: Volunteer services	\$8,500	Pending ▼	07/01/2024
Second Harvest of Silicon Valley (donated food)	\$24,000	Pending ▼	07/01/2024
<b>Total</b>	<b>\$423,081</b>		

\*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".

B. 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 organization's 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.

See attached letters of commitment from Downtown Streets Team and Second Harvest of Silicon Valley.

## SECTION 3: STATEMENT OF WORK/PROJECT SCOPE



## Part 1 - Project Location and Service Area

Provide the street address and assessor's parcel number(s) of the project location.

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.

The main focus areas within Sunnyvale are downtown and Fair Oaks park. (See map in attachments.) WorkFirst Sunnyvale teams also respond to city requests for hot spots that expand outside the service area map and potentially offer additional services that might fall under the STE program. WorkFirst Sunnyvale teams also visit multiple encampments for recruitment of Team Members.

Our Daily Bread provides hot lunches to Team Members at St. Thomas Episcopal Church, as well as providing meals at the Tuesday team meetings.

SCS offers emergency assistance services and access to our daily Self-Select food pantry to DST Team Members at SCS' offices (1160 Kern Ave, Sunnyvale, 94085) and will continue to host DST workshops and events there.

SCS and DST perform weekly outreach activities in parks and encampments to offer our mutual resources and refer people to shelter and other programs. SCS hosted our first Unhoused Resource Fair on January 19, 2024, with over 20 partner agencies on site.

DST and SCS make referrals to the North County Shelter.

## 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:

- Predevelopment milestones (design, permitting, securing matching funds)
- 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.

Because WorkFirst Sunnyvale is an existing project that operates year-round, all partner agencies will be ready to continue without interruption when new funding takes effect on July 1, 2024.

Recruitment for WFS is done on several fronts. Both SCS and DST have close connections with Public Safety and other City departments, which frequently refer homeless people to SCS for assistance. SCS staff also look for potential DST clients during our outreach activities at the Sunnyvale Library, the North County Shelter, Our Daily Bread, and other community gathering places including Fair Oaks Park. Similarly, DST staff and peer outreach teams continuously perform outreach throughout Sunnyvale, and work with Public Safety, Home First, Helping Hands, and other agencies to respond to encampments or individuals who may benefit from our services. Downtown Streets Team has developed a positive reputation and rapport with Sunnyvale's homeless, and as a result, maintains a wait list of about four prospective Team Members in addition to the average of 16-20 active members serving each week.

WorkFirst Sunnyvale will continue to be evaluated on a quarterly basis, with reports submitted to the City. DST measures each individual's progress in job readiness, job training, and job placement, including specific milestones such as completion of our Job Squad course.

Eligibility criteria for the program will be one or more of the following: a record of homelessness or risk of homelessness, income level, and/or proof of residence (or homelessness) in Sunnyvale.

### B. Implementation Schedule

Milestone	Target Date
1. Contract Start Date	07/01/2024
2. Design and Permitting	
3. Initiation of Construction/Project	
4. Completion of Construction/Project	
5. 50% of Funds Expended and Drawn	12/31/2024
6. 100% of Funds Expended and Drawn	06/30/2025
7. Project Completion and Reporting	06/30/2025

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

1. CDBG/HOME OBJECTIVE	2. CDBG/HOME OUTCOME
Creating Economic Opportunities	Availability/Accessibility

D. 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
Low Income (50%-80% AMI)			0
Very Low Income (<50% AMI)	60	0	60
Disabled Persons	15		15
Female-Headed Households	12	1	13
Elderly	2		2
Youth			0
Homeless Persons	20		20
Other Special Needs			0

### Part 3 - Construction Project Description

A. Does your project involve:

Acquisition? No

New construction? No

Major rehabilitation?\* No

Minor rehabilitation? 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? No

Provide date site control acquired:

### 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

Provide 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)? No

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

E. 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

NA

F. Attach the following items as attachments to this application

- Property Survey or Assessor's Parcel Map

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

#### **G. Community Involvement**

For new construction or facility/housing expansion projects, include evidence of community support for the proposed project. Describe the measures your organization has taken to garner community support in the space below. Provide evidence of contact with local neighborhood association(s) or proof of public hearing. **Include letters of support as attachments to this application**

NA

## **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. List the sources of funding.

DST staff salaries and benefits for program delivery make up the largest portion of the budget. This request will cover partial salaries for direct service staff, including a Project Manager to manage the program and develop partnerships, an Employment Specialist to provide employment counseling, and one Case Manager for outreach and to help remove barriers to employment. The DST budget also includes supplies, marketing/PR, mileage, and cell phones/plans. The match and in-kind portion of the budget consists of basic needs vouchers, donated employment workshops (Job Squad), and in-kind volunteer time.

Most of the SCS budget is for direct case management and supportive services. Our Case Manager will work with homeless individuals and coordinate with DST staff to support the employment goals of WorkFirst Sunnyvale (WFS) Team Members. A portion of the case management program supervisor's salary is also funded to oversee SCS services provided to WFS members and help coordinate comprehensive safety-net services.

Both SCS and DST leverage matching donations for both staffing as well as supportive services for this program.

Both the SCS and DST budgets include a 10% de minimis overhead rate, which is allowed for all federal contracts.

### **Part 2 - Financial Information**

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

- financial reporting,
- record keeping,
- accounting systems,
- payment procedures, and
- audit history, and
- compliance with OMB Circulars and GAAP

Both SCS and DST are 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 process and systems are up to date.

DST also has an excellent financial record and sound financial and accounting practices. Since its founding in 2005, DST has garnered growing support from businesses and community supporters and has received "clean" financial audits with no findings.

SCS has sound financial reserves and funding sources for our programs and projects. We hold 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.

Both our agencies maintain confidential client records, request client "Release of Information" forms for confidential data and enter client notes and VI-SPDAT vulnerability assessment scores into the County's HMIS database (Clarity), as needed. SCS uses the industry-standard Nonprofit Success Pack from Salesforce.org for reporting and keeping confidential client notes.

Provide the most recent Board-approved financial audit as an **attachment** to this application.

## B. Budget for Fiscal Year 2023-24

Budget Line Item	Sunnyvale	Other Funds	Matching In-Kind Services or Materials	Program Total
Non-Personnel				
Project Management/Administration	\$511,811	\$373,721	\$49,360	\$934,892
Permits and Fees				\$0
Design (Architectural & Engineering)				\$0
Acquisition Costs (escrow fees, etc.)				\$0
Other Soft Costs (Monitoring, Surveying, etc.)				\$0
Rehabilitation/Construction Costs (labor, materials)				\$0
Contingency (Construction)				\$0
Environmental Compliance (CEQA/NEPA/Phase 1 etc)				\$0
Construction Management (outside firm)				\$0
<b>TOTAL</b>	<b>\$511,811</b>	<b>\$373,721</b>	<b>\$49,360</b>	<b>\$934,892</b>

## C. Other Funding Sources

Other Funding Sources	
Committed	Amount
Total Committed	\$0
Projected Funding Sources	
Individuals	\$186,861
Corporate	\$93,430
Foundations	\$93,430
DST: Job Squad Skills workshops	\$8,500
DST: Volunteer Services	\$8,360
SCS: Volunteer services	\$8,500
Second Harvest of Silicon Valley (donated food)	\$24,000
In-Kind Services/Materials/Labor	\$49,360
Total Projected	\$423,081
Total Other Funding + In-Kind (must match budget above)	\$423,081

## Attachments

Pro-forma	<a href="#">Proforma-SCS_Budget_FY23-24.pdf</a>
Project Service Area Map	<a href="#">SCS-DST-WFS_project_area_service_map.pdf</a>
Project-Specific Organizational Chart Resumes of Applicant's key personnel	<a href="#">SCS-DST-WFS-OrgCharts-FY24-25.pdf</a> <a href="#">SCS-DST-WFS_Key_Personnel_Resumes-Redacted.pdf</a>
Signature Authorization	<a href="#">SCS_Signature_Authorization-Workfirst.pdf</a>
Conflict of Interest Disclosure	<a href="#">SCS-Conflict_of_Interest-Workfirst.PDF</a>
Environments Review Form	<a href="#">SCS_Environmental_Review.pdf</a>
CHDO or CBDO Verification	<a href="#">SCS_2024_CBDO_Verification_Letter-DST.pdf</a>
Bylaws	<a href="#">SCS_By_Laws.pdf</a>
Articles of Incorporation	<a href="#">SCS_Articles_of_Incorporation.pdf</a>
501(c) (3) documentation from IRS	<a href="#">SCS_IRS_Letter.pdf</a>
Organizational Chart	<a href="#">SCS_Org_Chart_20240110.pdf</a>
Financial Audit	<a href="#">SCS-Audit-Report-2022-23.pdf</a>
Letters of Commitment	<a href="#">Letter_of_commitment_DST-SCS.pdf</a> <a href="#">SHSV-SCS-LOC_WorkFirst.pdf</a>

Board Resolution authorizing submittal of proposal	<a href="#">SCS-Board Resolution -DST.pdf</a>
Language Access Plan and (ADA) Accessibility Policy	<a href="#">SCS Language Access 2023.pdf</a> <a href="#">SCS Accessibility Plan 2023.pdf</a>
Appraisal of Property	
Environmental Site Assessment	
Parcel Map	
Property Listing	
Relocation Plan (if project anticipates displacement)	
Letters of Community Support	
Architectural Drawings/Plans	
Other - <input type="text" value="DST Overview and Survey Results"/>	<a href="#">DST and STE-OnePager.pdf</a> <a href="#">2023_TM_-DST-Survey-Final.pdf</a>
Other - <input type="text" value="Application Cover Letter"/>	<a href="#">CDBG_WFSvale_Cover_letter_2024.pdf</a>

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Program Manager Signature     [Catherine Farry](#)  
Date Signed                      [01/19/2024](#)

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City/City Accepted Signature     [Amanda Sztoltz](#)  
Date Signed                          [03/21/2024](#)

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Initially submitted: Jan 19 14:20:30, - 2024

	A	B	C	D	E	F	G	H	I	J	
1	City of Sunnyvale Housing Division										
2	APPENDIX B, BUDGET										
3	Document Date	2/27/2024									
4	Contract Term	Begin Date	End Date	Duration (Years)							
5		7/1/2024	6/30/2025	1							
6	Proposer Name	Sunnyvale Community Services									
7	Program	WorkFirst Sunnyvale									
8	Budget Names	WorkFirst Sunnyvale, Supportive Services - Capacity Building, Start Up - Supportive Services									
9	Maximum Funding:	\$ 511,811									
10											
11											
12											
13											
14											
15	EXPENDITURES										
16	Salaries & Benefits	\$	441,383	\$	-	\$	-	\$	-	\$	441,383
17	Operating Expenses	\$	23,900	\$	-	\$	-	\$	-	\$	23,900
18	Subtotal	\$	465,283	\$	-	\$	-	\$	-	\$	465,283
20	Indirect Cost	\$	46,528	\$	-	\$	-	\$	-	\$	46,528
21	Other Expenses (Not Eligible for indirect %)	\$	-	\$	-	\$	-	\$	-	\$	-
22	Capital Expenditure	\$	-	\$	-	\$	-	\$	-	\$	-
24	TOTAL EXPENDITURES	\$	511,811	\$	-	\$	-	\$	-	\$	511,811
25											
26	SUNNYVALE REVENUES:										
27	CDBG	\$	511,811	\$	-	\$	-	\$	-	\$	511,811
28		\$	-	\$	-	\$	-	\$	-	\$	-
29		\$	-	\$	-	\$	-	\$	-	\$	-
46	TOTAL SUNNYVALE REVENUES	\$	511,811	\$	-	\$	-	\$	-	\$	511,811
47											
48	OTHER REVENUES (NON-SUNNYVALE):										
49	Individuals	\$	186,861	\$	-	\$	-	\$	-	\$	186,861
50		\$	93,430	\$	-	\$	-	\$	-	\$	93,430
51	Foundations	\$	93,430	\$	-	\$	-	\$	-	\$	93,430
52		\$	-	\$	-	\$	-	\$	-	\$	-
53	TOTAL OTHER REVENUES	\$	373,721	\$	-	\$	-	\$	-	\$	373,721
54											
55	TOTAL SUNNYVALE + OTHER REVENUES	\$	885,532	\$	-	\$	-	\$	-	\$	885,532
56	Rev-Exp (Budget Match Check)	\$	373,721	\$	-	\$	-	\$	-	\$	373,721
57											
58	Total Adjusted Salary FTE (All Budgets)	6.51		0.00		0.00		0.00		0.00	
59											
60	Approved by:										
61	Title:										
62	Phone Number :										
63	Email:										

	A	B	C	D	E	F	J
1	City of Sunnyvale Housing Division						
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5		7/1/2024	6/30/2025	1			
6	Proposer Name	Sunnyvale Community Services					
7	Program	WorkFirst Sunnyvvale					
8	Budget Name	WorkFirst Sunnyvvale					
9	Maximum Funding:	\$ 511,811					
10							
11					Year 1	Year 2	All Years
					7/1/2024 - 6/30/2025	7/1/2025 - 6/30/2026	7/1/2024 - 6/30/2026
12					12 Months	12 Months	New
13					New	New	
14							
15	EXPENDITURES						
16	Salaries & Benefits				\$ 441,383	\$ -	\$ 441,383
17	Operating Expenses				\$ 23,900	\$ -	\$ 23,900
18	Subtotal				\$ 465,283	\$ -	\$ 465,283
19	Indirect Percentage				10.00%		
20	Indirect Cost (Line 18 X Line 19)				\$ 46,528	\$ -	\$ 46,528
21	Other Expenses (Not Eligible for indirect %)				\$ -	\$ -	\$ -
22	Direct Client Expenditures				\$ -	\$ -	\$ -
24	TOTAL EXPENDITURES				\$ 511,811.00	\$ -	\$ 511,811
25							
26	CITY OF SUNNYVALE REVENUES:						
27	CDBG				\$511,811		\$511,811
28							\$ -
29							\$ -
46	TOTAL SUNNYVALE REVENUES				\$ 511,811	\$ -	\$ 511,811
47							



	A	B	C	D	E	F	J
1	City of Sunnyvale Housing Division						
2	APPENDIX B, BUDGET						
3	Document Date	2/27/2024					
4	Contract Term	Begin Date	End Date	Duration (Years)			
5		7/1/2024	6/30/2025	1			
6	Proposer Name	Sunnyvale Community Services					
7	Program	WorkFirst Sunnyvvale					
48	OTHER REVENUES (NON-SUNNYVALE) (Enter)						
49	Individuals				\$ 186,861		\$ 186,861
50	Corporate				\$ 93,430		\$ 93,430
51	Foundations				\$ 93,430		\$ 93,430
52							\$ -
53	TOTAL OTHER REVENUES				\$ 373,721.00	\$ -	\$ 373,721.00
54							
55	TOTAL SUNNYVALE + OTHER REVENUES				\$ 885,532	\$ -	\$ 885,532
56	Rev-Exp (Budget Match Check)				\$ 373,721	\$ -	\$ 373,721
57							
58							
59							
60	Approved by:						
61	Title:						
62	Phone Number :						
63	Email:						

	A	B	C	D	H
1	City of Sunnyvale Housing Division				
2	OPERATING DETAIL				
3	Document Date	2/27/2024			
4	Proposer Name	Sunnyvale Community Services			
5	Program	WorkFirst Sunnyvale			
6	Budget Name	WorkFirst Sunnyvale			
7					
8			Year 1	Year 2	All Years
9			7/1/2024 - 6/30/2025	7/1/2025 - 6/30/2026	7/1/2024 - 6/30/2026
10			12 Months	12 Months	
11			Budgeted Expense	Budgeted Expense	Budgeted Expense
12	OPERATING EXPENSES				
13	Rental of Property		\$ 7,000		\$ 7,000
14	Utilities(Elec, Water, Gas, Phone, Scavenger)				\$ -
15	Office Supplies, Postage				\$ -
16	Building Maintenance Supplies and Repair				\$ -
17	Printing and Reproduction				\$ -
18	Insurance		\$ 1,400		\$ 1,400
19	Staff Training				\$ -
20	Staff Travel-(Local & Out of Town)				\$ -
21	Rental of Equipment				\$ -
22	Program Supplies		\$ 7,500		\$ 7,500
23	Marketing/PR/Supplies		\$ 2,000		\$ 2,000
24	Communications		\$ 3,000		\$ 3,000
25	Mileage		\$ 3,000		\$ 3,000
26					\$ -
27					\$ -
28					\$ -
55	Consultants:				
56					\$ -
57					\$ -
58					\$ -
59					\$ -
60					\$ -
61					\$ -
66					
67	TOTAL OPERATING EXPENSES		\$ 23,900	\$ -	\$ 23,900
68					
69	OTHER EXPENSES (Not Eligible for Indirect Cost %)				
70					\$ -
71					\$ -
72					\$ -
73					\$ -
74					\$ -
75					\$ -
80	Subcontractors:				
81					\$ -
82					\$ -
83					\$ -
90	Subcontractor indirect		\$ -	\$ -	\$ -
91					
92	TOTAL OTHER EXPENSES		\$ -	\$ -	\$ -
93					
94	DIRECT CLIENT EXPENSES				
95					
96					\$ -
97					\$ -
98					\$ -
102					
103	TOTAL DIRECT CLIENT EXPENSES		\$ -	\$ -	\$ -

	A	B	C	D	E	F	G	H	I	J	K	L	AB
1	City of Sunnyvale Housing Division												
2	SALARY & BENEFIT DETAIL												
3	Document Date	2/27/2024											
4	Proposer Name	Sunnyvale Community Services											
5	Program	WorkFirst Sunnyvale											
6	Budget Name	WorkFirst Sunnyvale											
7													
8													
9		Year 1					Year 2						
10		Agency Totals		For Sunnyvale Funded Program		7/1/2024 - 6/30/2025	Agency Totals		For Sunnyvale Funded Program		7/1/2025 - 6/30/2026	7/1/2024 - 6/30/2026	
11						12 Months					12 Months		
12						New					New	New	
13	POSITION TITLE	Annual Full Time Salary (for 1.00 FTE)	Position FTE	% FTE funded by this budget	Adjusted Budgeted FTE	Budgeted Salary	Annual Full Time Salary (for 1.00 FTE)	Position FTE	% FTE funded by this budget	Adjusted Budgeted FTE	Budgeted Salary	Budgeted Salary	
14	SCS Program Manager	\$ 68,000	1.00	75%	0.75	\$ 51,208					\$ -	\$ 51,208	
15	SCS Caseworker	\$ 56,000	1.00	100%	1.00	\$ 56,000					\$ -	\$ 56,000	
16	DST Dir. Of Program Operations	\$ 125,560	1.00	26%	0.26	\$ 32,646					\$ -	\$ 32,646	
17	DST Sunnyvale Program Manager	\$ 86,237	1.00	100%	1.00	\$ 86,237					\$ -	\$ 86,237	
18	DST Case Manager	\$ 58,425	1.00	100%	1.00	\$ 58,425					\$ -	\$ 58,425	
19	DST Employment Specialist	\$ 58,425	1.00	50%	0.50	\$ 29,213					\$ -	\$ 29,213	
20	STE Team Lead	\$ 26,330	1.00	100%	1.00	\$ 26,330					\$ -	\$ 26,330	
21	STE Team Lead	\$ 26,330	1.00	100%	1.00	\$ 26,330					\$ -	\$ 26,330	
22						\$ -					\$ -	\$ -	
23						\$ -					\$ -	\$ -	
24						\$ -					\$ -	\$ -	
25						\$ -					\$ -	\$ -	
26						\$ -					\$ -	\$ -	
27						\$ -					\$ -	\$ -	
28						\$ -					\$ -	\$ -	
29						\$ -					\$ -	\$ -	
30						\$ -					\$ -	\$ -	
31						\$ -					\$ -	\$ -	
32						\$ -					\$ -	\$ -	
33						\$ -					\$ -	\$ -	
34						\$ -					\$ -	\$ -	
35						\$ -					\$ -	\$ -	
36						\$ -					\$ -	\$ -	
37						\$ -					\$ -	\$ -	
38						\$ -					\$ -	\$ -	
39						\$ -					\$ -	\$ -	
40						\$ -					\$ -	\$ -	
41						\$ -					\$ -	\$ -	
42						\$ -					\$ -	\$ -	
43						\$ -					\$ -	\$ -	
44						\$ -					\$ -	\$ -	
45						\$ -					\$ -	\$ -	
46						\$ -					\$ -	\$ -	
47						\$ -					\$ -	\$ -	
48						\$ -					\$ -	\$ -	
49						\$ -					\$ -	\$ -	
50						\$ -					\$ -	\$ -	
51						\$ -					\$ -	\$ -	
52						\$ -					\$ -	\$ -	
53						\$ -					\$ -	\$ -	
54						\$ -					\$ -	\$ -	
55						\$ -					\$ -	\$ -	
56					TOTAL SALARIES	\$ 366,389			TOTAL SALARIES	\$ -	\$ 366,389		
57		TOTAL FTE :			6.51								
58		FRINGE BENEFIT RATE:				23.00%							
59		EMPLOYEE FRINGE BENEFITS:				\$ 74,994.00				\$ -	\$ 74,994		
60		TOTAL SALARIES & BENEFITS:				\$ 441,383				\$ -	\$ 441,383		
61													

	A	B	C	D	E
2	<b>BUDGET NARRATIVE</b>				
3	<b>WorkFirst Sunnyvale</b>				
4	<b><u>Salaries &amp; Benefits</u></b>	<b><u>Adjusted Budgeted FTE</u></b>	<b><u>Budgeted Salary</u></b>	<b><u>Justification</u></b>	<b><u>Calculation</u></b>
5	SCS Program Manager		\$ -	<p>- A portion of the case management program supervisor's salary is funded to oversee SCS services provided to WFS members and help coordinate comprehensive safety-net services. NOTE: Fringe Benefit Rate for this position includes taxes only (no benefits).</p> <p>- Case Manager will work with homeless individuals and coordinate with DST staff to support the employment goals of WorkFirst Sunnyvale (WFS) Team Members and ensure they are connected to available services and resources.</p> <p>- The Director is responsible for the direct supervision of the Project Manager and other program staff. The Director represents DST to all existing and potential partners including; local government agencies, other social service providers, community-based groups, private businesses and other stakeholders. Regionally engage business community through Business Improvement District, Chamber of Commerce, and other organizations and events. Review annual budget with PM's and submit regional budget for approval. Review monthly financial statements with PM's to develop and maintain monthly fundraising plan trajectory. Work with finance to ensure invoicing is submitted approved by the funder and that all spending is within program budget.</p> <p>- The Project Manager is responsible for the overall management and operation of our Volunteer Program in Sunnyvale which encourages unhoused individuals to volunteer their time on street cleanup and beautification projects. The Project Manager promotes DST to the greater community by representing the Team to all existing and potential partners including local government agencies, other social service providers, community-based groups, private business, and other stakeholders. They are responsible for tracking and reporting project data to contractor, partners and DST management while focusing on contract compliance and goals.</p> <p>- The Case Manager will work directly with Team Members to navigate services and help them reduce the barriers to self-sufficiency. Case Managers will assist with housing resources and doing landlord outreach, and Research and utilize any available subsidies and affordable housing units to place Team Members into housing. They assist TM's with vital documents, connecting with health providers as well as mental health services. Support Team Members in court, at housing related appointments, and social service agencies.</p> <p>- The Employment Specialist will work directly with Team Members to navigate services and help them reduce the barriers to employment related self-sufficiency. Assisting in preparing TM's for employment by hosting workshops, working one on one with TM's, doing employment outreach and creating resumes, helping them apply for employment and continuing to support TM's after they are employed. Employment Specialist will also assist TM's with applying for SSI, SSDI and other financial benefits they qualify for.</p>	
	SCS Caseworker		\$		
6					
	DST Dir. Of Program Operations		\$		
7					
	DST Sunnyvale Program Manager		\$		
8					
	DST Case Manager		\$		
9					
	DST Employment Specialist		\$		
10					
	STE Team Lead		\$		
11					

	A	B	C	D	E
12	STE Team Lead		\$	- STE is the second tier on the ladder for Team Members to step up into employment utilizing the knowledge, skills and life experience to support projects in their local community. As they transition into employment, STE employees are provided case management and employment coaching from DST to support further advancement into future living-wage employment opportunities. Remove and collect project litter throughout project areas. Transport debris collection tools from launch site to project area. Manage Team Member volunteers on shift, adhering to all programmatic policies and procedures. Report volunteer hours and debris collected on shift. NOTE: Fringe Benefit Rate for this position is 19%.	
13			\$	- STE is the second tier on the ladder for Team Members to step up into employment utilizing the knowledge, skills and life experience to support projects in their local community. As they transition into employment, STE employees are provided case management and employment coaching from DST to support further advancement into future living-wage employment opportunities. Remove and collect project litter throughout project areas. Transport debris collection tools from launch site to project area. Manage Team Member volunteers on shift, adhering to all programmatic policies and procedures. Report volunteer hours and debris collected on shift. NOTE: Fringe Benefit Rate for this position is 19%.	
46			\$	-	
47	TOTAL		\$	-	
48	Employee Fringe Benefits		\$	- Includes FICA, SSUI, Workers Compensation and Medical calculated at XX% of total salaries.	
49	<b>TOTAL SALARIES &amp; BENEFITS</b>		\$	-	
50					
51	<b><u>Operating Expenses</u></b>		<b><u>Budgeted Expense</u></b>	<b><u>Justification</u></b>	<b><u>Calculation</u></b>
52	Rental of Property		\$	-	
53	Utilities(Elec, Water, Gas, Phone, Scavenger)		\$	-	
54	Office Supplies, Postage		\$	-	
55	Building Maintenance Supplies and Repair		\$	-	
56	Printing and Reproduction		\$	-	
57	Insurance		\$	-	
58	Staff Training		\$	-	
59	Staff Travel-(Local & Out of Town)		\$	-	
60	Rental of Equipment		\$	-	
61	Program Supplies		\$	-	
63	Communications		\$	-	
64	Mileage		\$	-	
93			\$	-	
94	<u>Consultants:</u>				
95			\$	-	
105			\$	-	
106					
107	<b>TOTAL OPERATING EXPENSES</b>		\$	-	

	A	B	C	D	E
108	Indirect Cost		\$ -		
109					
110					
	<b>Other Expenses (not subject to</b>				
111	<b>indirect cost %)</b>	<b>Amount</b>	<b>Justification</b>	<b>Calculation</b>	
112		\$ -			
121		\$ -			
122	Subcontractors:				
123		\$ -			
131		\$ -			
132	Subcontractor indirect	\$ -			
133					
134	TOTAL OTHER EXPENSES		\$ -		
135					
136					
137	<b>DIRECT CLIENT EXPENSES</b>	<b>Amount</b>	<b>Justification</b>	<b>Calculation</b>	
138		\$ -			
144		\$ -			
145					
146	TOTAL DIRECT CLIENT EXPENSES		\$ -		
147					

**Tenant Based Rental Assistance Administrator  
City of Sunnyvale  
FY 2024/2025 and 2025/2026  
Home Investment Partnerships Program (HOME)**

**Applicant Information**

Legal Name of Organization:	Sunnyvale Community Services		
Mailing Address:	1160 Kern Avenue	City: Sunnyvale, CA	Zip: 94085-3907
Website:	<a href="https://svcommunityservices.org/">https://svcommunityservices.org/</a>		
Contact Person:	Catherine Farry	Title:	Chief Data & Research Officer
Contact Email:	<a href="mailto:cfarry@svcommunityservices.org">cfarry@svcommunityservices.org</a>	Telephone:	408-636-7059
Executive Director:	Marie Bernard	Email:	<a href="mailto:mbernard@svcommunityservices.org">mbernard@svcommunityservices.org</a>
Agency Type:	Non-Profit with 501(c)(3) Status Describe: 0		
SAM Number:	LV2JBL2FB2Z1		

**PROGRAM OVERVIEW**

Project Name:	Sunnyvale Tenant-Based Rental Assistance (Sunnyvale TBRA)		
Project Address:	1160 Kern Ave	City: Sunnyvale	Zip: 94085

**Select an Application:**  
**Tenant Based Rental Assistance Administrator**

**Loan Request**

Requested Amount	\$2,700,000
Other Funding Sources	\$1,192,152
Total Project Cost	\$3,892,152
Percentage of City of Sunnyvale funds toward Total Project Cost	69%

**Brief Project Description:**

Sunnyvale Community Services (SCS) proposes to administer and provide a rental assistance program, including supportive services and intensive case management, for 40 Sunnyvale low-income households at any given time, as they work toward self-sufficiency. Total participation is projected at 50 unduplicated households (approximately 100 individuals) from July 2024 through June 2026. We expect most households to participate the full 24 months, with 10 households exiting yearly. The Sunnyvale TBRA program will serve unhoused persons and individuals/families at imminent risk of homelessness in Sunnyvale. SCS will offer all participants comprehensive safety-net services customized to meet their individual needs, promoting housing stability.

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 in accordance with the attached Staffing Plan/Model..

	NAME	TITLE	PHONE	EMAIL
<b>Program Contact</b> Someone who works with the project on a daily basis, and can answer questions	David Hernandez	Chief Programs Officer	408-738-4321 X2016	<a href="mailto:dhernandez@svcommunityservices.org">dhernandez@svcommunityservices.org</a>
<b>Finance Contact</b>	Carmen Davis	Accounting Manager	408-738-4321 X2008	<a href="mailto:cdavis@svcommunityservices.org">cdavis@svcommunityservices.org</a>
<b>Application Contact</b> Person who wrote this application	Catherine Farry	Chief Data and Research Officer	408-636-7059	<a href="mailto:Cfarry@svcommunityservices.org">Cfarry@svcommunityservices.org</a>



<b>Authorized Contact</b> Person authorized to make commitments on behalf of the organization	Marie Bernard	Executive Director	408-738-0121	mbernard@svcommunityservices.org
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## **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
- CBDO qualifications, if applying for a CBDO activity (See CFR 570.204)

Provide a project-specific organizational chart as an attachment to all copies of the proposal in Tab D and one copy only of the organizational chart for the entire agency in the original application (Tab E).

Sunnyvale Community Services (SCS), founded in 1970, is a 501(c)(3) nonprofit organization serving residents of Sunnyvale, California with direct financial aid, food, and other emergency support services. We also assist unhoused individuals and families and serve as a safety-net hub for underserved residents 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 eight years. We have also administered rental assistance programs, including the City of Sunnyvale's Homeless Prevention and Rapid Rehousing (HPRR) program for over eight 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 emergency food, mortgage/rent payments, 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 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.

### **B. Previous experience using federal funds:**

1. Does your organization have experience with rental assistance/TBRA projects involving federal funds **Yes**

2. How many years of previous experience do you have with federally funded projects? **32**

Briefly describe your experience below:

SCS has managed federally funded CDBG projects for over 30 years and has received EFSP (FEMA) funding for over two decades. We also 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 has 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]).

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**

Indicate the actions cited in the space provided below. **SCS did have to return a small amount of Homelessness Prevention and Rapid Re-Housing Program (HPRP) funds in 2011, but we were allowed to use 100% of those returned funds for other eligible grant purposes on the same grant.**

### **C. Previous Experience with City-funded projects**

1. Do you have previous experience with City-funded projects? **Yes**

Describe:

SCS has received Housing and Human Services grants from the City of Sunnyvale for decades and has consistently been ranked high in competitive grant awards ratings.

2. Has your organization received HUD funds previously from the City of Sunnyvale? **Yes**

Describe:

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.

3. If you are a prior recipient of City of Sunnyvale HUD funds, what was the date of your last City of Sunnyvale monitoring visit? **08/30/2023**

4. Were there any findings and/or concerns identified during your last monitoring visit by the City? **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.

Board Member Name	Sunnyvale Resident	Employer (if any)	Office Held on Board	Term of Office (Beginning and Ending years)	Length of Service
Amal Allan	No	City National Bank		2022-25	2
Mary Bradley	Yes		Secretary	2020-2026	4
Rick Crowley	Yes		Treasurer	2021-2024	3
Travis Duncan	No	DECA Companies		2019-2025	5
Ava Fanucchi	Yes	Sunnyvale Department of Public Safety		2022-2025	2
Michael Gallagher	No	Sunnyvale School District		2019-2025	5
Clayton Grames	No	Intuitive Surgical		2022-2025	2
Jaqui Guzmán	Yes	City of Sunnyvale	Vice President	2020-2026	4
Debbie Klein	Yes			2022-2025	2
José León	Yes	New York Life		2022-2025	2
Margaret Mannion	No	NetApp, Inc.		2018-2024	6
Jeremy Nishihara	No	Sunnyvale School District	President	2018-2024	6
Christian Pellecchia	No	JE Dunn Construction		2019-2022, 2023-2026	4
Benjamin Picard	Yes			2022-2025	2
Elsbeth TeBrake	No			2022-2026	2
Barry Vickrey	Yes			2023-2026	1
Rachel Zlotziver	No	Fremont Union High School District		2022-2025	2

## **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.** For TBRA, you must select "Limited Clientele Activity".

**1.** Method of determining eligibility.

- ☐ Area Benefit
- ☒ Limited Clientele
- ☐ Activity Job Creation

Per federal guidelines, eligibility for Sunnyvale TBRA will be limited to households earning 80% or less of the Area Median Income (AMI) as defined by the U.S. Department of Housing and Urban Development. At least 90% of TBRA clients will be those earning 60% or less of AMI.

For the Sunnyvale TBRA program, SCS will be prioritizing households that are either already homeless or at imminent risk of homelessness.

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

Total number of unduplicated households served	Number of unduplicated lower-income households to be served	Percentage of lower-income households served
50	50	100%

## Part 3 - Demonstrated Need for Project

Provide a brief summary of **current** statistical data documenting the need for your proposed TBRA project. Include local Sunnyvale data as well as any relevant statistics collected by applicant. Provide sources for the information. Briefly summarize the mission and vision of your proposed TBRA program (more details requested later in the application), and how it will maximize the federal and local resources to serve the most households possible, while providing adequate supportive services to program participants. Describe how your project's design will meet the needs y

According to the U.S. Census Bureau's American Community Survey (2022 ACS 1-Year Estimates), approximately 6% of Sunnyvale residents live in poverty, including 1,250 children (under 18 years of age), 6,600 adults (aged 18-64) and 1,510 seniors (65+ years). 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.

The actual number of people living in poverty in Sunnyvale is considerably higher. In Santa Clara County, even a household earning 200% of FPL (approximately \$120,000) 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 (\$181,300 for a family of four).

The 2023 AMI HUD guidelines define 'Low Income' for a family of four in Santa Clara County as a household earning \$137,100 or less. The Insight Center's Family Needs Calculator estimates that \$138,742 per year is required to cover basic expenses for a family of four. To earn this base salary, two adults would have to work 73.6 hours/week each at the Sunnyvale minimum wage (\$18.55/hr in 2024). A single adult with two children would have to work 128 hours/week to make ends meet (base salary of \$120,775).

In Fiscal Year 2022-23, SCS assisted 10,614 unduplicated individuals, 98% of whom were in households with extremely low to low incomes based on HUD standards. Among those clients were 770 homeless individuals to whom SCS provided one or more services.

Per the Sunnyvale Consolidated Plan, SCS's Sunnyvale TBRA program will serve homeless clients and very low-income households at imminent risk of homelessness. Clients will receive case management to assist with finding housing, maintaining or obtaining employment and benefits, and addressing related needs.

SCS is uniquely suited for operating the TBRA program in Sunnyvale:

\*We are based in Sunnyvale and are the designated safety-net agency for the city and we are the current TBRA

administrator for Sunnyvale.

\*We have been providing TBRA referrals, case management, and additional financial assistance for eight years.

\*We have extensive experience with administering rental assistance programs, including the federally funded HPRR program.

\*We have established a large network of landlords and property managers in the Sunnyvale community who trust SCS, which increases housing options for TBRA clients.

\*We have highly skilled staff in place to provide a wide range of wrap-around services to supplement the activities funded under TBRA. Our Benefits Specialist can help TBRA participants enroll in CalFresh, Medi-Cal, and other benefits programs. We also help with application fees, utility deposits, medical bills, car repairs, move-in costs (including furniture and household supplies), relocation costs and case management after TBRA program exit, employment searches, and much more.

\*We have onsite food distributions as well as home delivery of groceries and prepared meals to frail elderly and disabled clients.

## Part 4 - Matching Funds

A. List the funding from other sources for this TBRA project in the following table. Please include other funding sources you are applying for (i.e., Housing Mitigation, PLHA, etc.) through this RFP.

Funding Source	Amount	Status as of Jan. 16, 2023*	Award Date
SCS: Staff salaries	\$597,152	Pending ▼	07/01/2024
SCS: Safety-Net expenses	\$75,000	Pending ▼	07/01/2024
SCS: Food, gift cards	\$30,000	Pending ▼	07/01/2024
SCS: Volunteer services	\$10,000	Pending ▼	07/01/2024
SCS: Admin/Fiscal Costs	\$460,000	Pending ▼	07/01/2024
Second Harvest of Silicon Valley: Food	\$20,000	Pending ▼	07/01/2024
<b>Total</b>	<b>\$1,192,152</b>		

\*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".

B. 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 organization's 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.

See attached letter of commitment from Second Harvest of Silicon Valley in support of our Food and Nutrition Program. Of the total commitment, \$10,000 is allocated each year towards supporting TBRA clients.

## SECTION 3: STATEMENT OF WORK/PROJECT SCOPE

### Part 1 - Target Population and Referral Source

In more detail, describe the proposed target population, and how the proposed target population is a proper fit for a time-limited rental assistance program. Additionally, describe how program participants will be referred to the program - whether through a direct referral from your agency or a partner agency (i.e., North County Shelter) - or a system like the County's Coordinated Assessment. Describe how your proposed referral source is the most effective method to serve the proposed target population.

The target population for the Sunnyvale TBRA program is people at risk of homelessness or who are already homeless. 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.

Referrals to the program will come through multiple partners that have been created through SCS's deep ties within the Sunnyvale community:

\* SCS itself, which annually provides safety-net services to more than 10,500 low-income Sunnyvale residents. On January 19, 2024, SCS hosted our first Unhoused Resource Fair with over 20 partner agencies on site.

\* HomeFirst, which operates the North County Shelter in Sunnyvale

\* Downtown Streets Team, which supports 50-70 unhoused people in Sunnyvale in obtaining work on an annual basis

\* Our Daily Bread, an independent non-profit Sunnyvale organization which provides services to local unhoused persons

\* St. Vincent de Paul, a faith-based organization which maintains an emergency hotline for individuals at risk of losing their housing and provides safety net services

\* Loaves and Fishes, which serves prepared meals to individuals in need of food assistance

\* Local public schools, who assist in identifying children eligible for services through the McKinney-Vento Homeless Assistance Act

\* Helping Hands Silicon Valley, which conducts homeless outreach across Sunnyvale and provides direct referrals to SCS.

These multiple referral sources are an effective method to serve the proposed target population because, together, they create a strong network working to assist people in need throughout Sunnyvale. Because the partners all provide a range of services, the referrals they provide to SCS combine to produce a broad pool of eligible households, ranging from unhoused persons to families and individuals looking for safety-net services to households referred by the schools their children attend.

## **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 details about the following (attach separate documents, if needed):

- Systems to comply with initial/ongoing TBRA eligibility requirements (include proposed payment standard)
- Systems to engage, communicate and partner with property owners/managers
- Describe client supportive services/case management plan (attach case management plan templates)

Describe your intake procedures and discuss initial and ongoing eligibility process that ensure compliance with HOME TBRA requirements. Please attach any existing documents/forms (i.e., rent calculation worksheet, HQS checklists, lease addendums, rent reasonableness process, etc.) to the application.

Because SCS is currently the administrator for the Sunnyvale TBRA program there will be no disruption to existing TBRA clients, or any ramp-up time required to maintain the program. The TBRA program is fully integrated into SCS' finance procedures and SCS' client intake procedures comply with TBRA requirements.

SCS will continue to implement a collaborative, client-driven case management, ensuring the delivery of quality supportive services through the effective and efficient use of resources. Case management supports the client's achievement of safe, realistic, and reasonable goals. Intensive case management services will focus on housing stability and placement, with an emphasis on the coordination, monitoring, and delivery of services related to housing needs and improving housing stability. Our case managers and case workers work with each client to address their specific situation and help identify their eligibility for additional resources (e.g., CalFresh, public assistance cash benefits, home energy/utility assistance programs, SSI, WIC, Covered California, other health and welfare benefits, etc.)

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 assist with assessing the household's situation and select housing intervention strategies designed to meet the household's needs.

SCS case management activities include these activities, as appropriate for each client:

\*Initial intake assessing the client's needs

\*Development of a case plan for each household, with specified goals

\*Frequent follow-on meetings (often weekly) and quarterly assessments

\*As needed, accompaniment to medical or legal appointments

\*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

SCS has established effective processes to maximize engagement and communication with property owners and managers. Components of this system include:

- \*The TBRA Housing Specialist engages with landlords to ensure 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
- \*Risk mitigation funds as needed to address excessive property damage beyond security deposit coverage
- \*Assistance with minor repairs as necessary to address deficiencies in the unit that may prevent it from meeting habitability standards
- \*Landlord/tenant mediation to respond to concerns and resolve conflicts
- \*Landlord/tenant education for all parties, including case managers and other staff who interact with landlords and renting participants
- \*Community-sponsored campaigns and events designed to engage and recruit landlords

#### B. Implementation Schedule

Milestone	Target Date
1. Contract Start Date	07/01/2024
2. Design and Permitting	
3. Initiation of Construction/Project	
4. Completion of Construction/Project	07/01/2024
5. 50% of Funds Expended and Drawn	06/30/2026
6. 100% of Funds Expended and Drawn	06/30/2026
7. Project Completion and Reporting	06/30/2026

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

1. HOME OBJECTIVE	2. HOME OUTCOME
Providing Decent Affordable Housing	Affordability

D. 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
Low Income (50%-80% AMI)	22		22
Very Low Income (<50% AMI)	28		28
Disabled Persons			0
Female-Headed Households			0
Elderly			0
Youth			0
Homeless Persons			0
Other Special Needs			0

## 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. List the sources of funding.



The largest line-item in the Sunnyvale TBRA budget is monthly rental assistance which are the funds distributed directly through TBRA to subsidize client rent.

The next largest line items are for SCS staff directly involved in the implementation and management of the TBRA program:

- \* One TBRA Program Manager (1.0 FTE) will manage and supervise the Sunnyvale TBRA program.
- \* 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.
- \* One TBRA Housing Specialist (1.0 FTE) will work with landlords to ensure clear communication and to provide support for both clients and landlords.
- \* A Database Administrator (0.05 FTE) will provide the necessary data support services for the program.
- \* Additional Supporting services and administrative staff (intake coordinator, caseworkers, benefits specialist, food & nutrition team, finance & accounting, IT)

Besides HOME, LMH, and HMF funding, monies for the Sunnyvale TBRA program will come from matching general operating and program funds by SCS, and in-kind donations from SCS and Second Harvest of Silicon Valley.

## Part 2 - Financial Information

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

- financial reporting,
- record keeping,
- accounting systems,
- payment procedures, and
- audit history, and
- compliance with OMB Circulars and GAAP

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 process and systems are up to date.

We have sound financial reserves and funding sources for our programs and projects. We hold 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.

SCS maintains confidential client records, requests client "Release of Information" forms for confidential data and enters client notes and VI-SPDAT vulnerability assessment scores into the County's HMIS database (Clarity), as needed. We use the industry-standard Nonprofit Success Pack from Salesforce.org for reporting and keeping confidential client notes.

Provide the most recent Board-approved financial audit as an **attachment** to this application.

## B. Budget for Fiscal Year 2023-24

Budget Line Item	Sunnyvale	Other Funding	Program Total
Direct Supporting Services for program delivery: Housing Case Manager, Program Manager (78%)	\$244,075		\$244,075
Administrative Staff (Program Manager (22%), Housing Specialist, Data Analyst)	\$164,059		\$164,059
Additional Supporting services staff (intake coordinator, caseworkers, benefits specialist, food &		\$487,360	\$487,360



nutrition team, housing team)			
Benefits	\$56,048	\$66,830	\$122,878
Taxes	\$36,031	\$42,962	\$78,993
<b>Subtotal Personnel</b>	<b>\$500,213</b>	<b>\$597,152</b>	<b>\$1,097,365</b>
Non-Personnel			
Move-In Assistance	\$2,000,000		\$2,000,000
Supplies & Materials			\$0
Equipment	\$14,787	5,000	\$19,787
Communications			\$0
Meetings & Convenings			\$0
Travel & Transportation		10,000	\$10,000
Training	\$5,000	\$5,000	\$10,000
Consulting			\$0
Evaluation			\$0
Motel assistance	30,000	20,000	\$50,000
Utilities, moving costs, medical bills, storage, car repairs, other critical needs	130,000	20,000	\$150,000
Workplace for Partner agencies and County Social Services		10,000	\$10,000
Transit passes, gift cards, misc. safety-net services		5,000	\$5,000
Food and Food gift cards		50,000	\$50,000
SCS Volunteer Services		10,000	\$10,000
<b>Subtotal Non-Personnel</b>	<b>\$2,179,787</b>	<b>\$135,000</b>	<b>\$2,314,787</b>
<b>Total Personnel &amp; Non-Personnel</b>	<b>\$2,680,000</b>	<b>\$732,152</b>	<b>\$3,412,152</b>
Indirect Costs	20,000	\$460,000	\$480,000
<b>TOTAL</b>	<b>\$2,700,000</b>	<b>\$1,192,152</b>	<b>\$3,892,152</b>
Proposed # of Persons Served:			
Cost per Individual			

## C. Other Funding Sources

Other Funding Sources	
Committed	Amount
Total Committed	\$0
Projected Funding Sources	
Individuals	\$581,076
Corporate	\$290,538
Foundations	\$290,538
Second Harvest of Silicon Valley: Food	\$20,000
SCS: Volunteer Services	\$10,000
In-Kind Services/Materials/Labor	\$30,000
Total Projected	\$1,192,152
Total Other Funding + In-Kind (must match budget above)	\$1,192,152

## Attachments

Pro-forma	<a href="#">Proforma-SCS Budget FY23-24.pdf</a>
Project Service Area Map	<a href="#">SCS TBRA Service Area Map.pdf</a>

Project-Specific Organizational Chart	<a href="#">SCS-TBRA-Key_Personnel_Resumes.pdf</a>
Resumes of Applicant's key personnel	<a href="#">SCS_TBRA_Org_Chart-202401015.pdf</a>
Signature Authorization	<a href="#">SCS_Signature_Authorization-TBRA.pdf</a>
Conflict of Interest Disclosure	<a href="#">SCS-Conflict_of_Interest-TBRA.PDF</a>
Environments Review Form	<a href="#">SCS_Environmental_Review_copy.pdf</a>
CHDO or CBDO Verification	<a href="#">SCS_2024_CBDO_Verification_Letter-TBRA.pdf</a>
Bylaws	<a href="#">SCS_By_Laws.pdf</a>
Articles of Incorporation	<a href="#">SCS_Articles_of_Incorporation.pdf</a>
501(c) (3) documentation from IRS	<a href="#">SCS_IRS_Letter.pdf</a>
Organizational Chart	<a href="#">20240110_SCS_Org_Chart.pdf</a>
Financial Audit	<a href="#">SCS-Audit-Report-2022-23.pdf</a>
Letters of Commitment	<a href="#">SHSV- SCS_2024 - Food_Nutrition.pdf</a>
Board Resolution authorizing submittal of proposal	<a href="#">SCS-Board_Resolution_-TBRA.pdf</a>
Language Access Plan and (ADA) Accessibility Policy	<a href="#">SCS_Accessiblity_Plan_2023.pdf</a> <a href="#">SCS_Language_Access_2023.pdf</a>
Appraisal of Property	
Environmental Site Assessment	
Parcel Map	
Property Listing	
Relocation Plan (if project anticipates displacement)	
Letters of Community Support	
Architectural Drawings/Plans	
Other - <input type="text" value="Workplan Support Documents"/>	<a href="#">SCS-TBRA_Workplan_Support_Documents.pdf</a>
Other - <input type="text" value="TBRA Application Cover Letter"/>	<a href="#">TBRA_Cover_letter_2024.pdf</a>

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Program Manager Signature [Catherine Farry](#)  
 Date Signed [01/19/2024](#)

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	A	B	C	D	E	F	G	H	I	J
1	City of Sunnyvale Housing Division									
2	APPENDIX B, BUDGET									
3	Document Date	2/27/2024								
4	Contract Term	Begin Date	End Date	Duration (Years)						
5		7/1/2024	6/30/2026	2						
6	Proposer Name	Sunnyvale Community Services								
7	Program	Sunnyvale TBRA								
	Budget Names	TBRA Program, Supportive Services - Capacity Building, Start Up - Supportive Services								
8										
9	Maximum Funding:	\$ 2,700,000								
10										
11					Year 1	Year 2	Year 3	Year 4	Year 5	All Years
12					7/1/2024 - 6/30/2025	7/1/2025 - 6/30/2026	1/0/1900 - 1/0/1900	1/0/1900 - 1/0/1900	1/0/1900 - 1/0/1900	7/1/2024 - 6/30/2026
13					12 Months	12 Months	0 Months	0 Months	0 Months	
15	EXPENDITURES									
16	Salaries & Benefits					\$ 247,888	\$ 252,325	\$ -	\$ -	\$ 500,213
17	Operating Expenses					\$ 92,112	\$ 87,675	\$ -	\$ -	\$ 179,787
18	Subtotal					\$ 340,000	\$ 340,000	\$ -	\$ -	\$ 680,000
20	Indirect Cost					\$ 10,000	\$ 10,000	\$ -	\$ -	\$ 20,000
21	Other Expenses (Not Eligible for indirect %)					\$ -	\$ -	\$ -	\$ -	\$ -
22	Capital Expenditure					\$ 1,000,000	\$ 1,000,000	\$ -	\$ -	\$ 2,000,000
24	TOTAL EXPENDITURES					\$ 1,350,000	\$ 1,350,000	\$ -	\$ -	\$ 2,700,000
25										
26	SUNNYVALE REVENUES:									
27	HOME					\$ 1,000,000	\$ 1,000,000	\$ -	\$ -	\$ 2,000,000
28	HMF					\$ 100,000	\$ 100,000	\$ -	\$ -	\$ 200,000
29	Low-Mod Housing Fund					\$ 250,000	\$ 250,000	\$ -	\$ -	\$ 500,000
46	TOTAL SUNNYVALE REVENUES					\$ 1,350,000	\$ 1,350,000	\$ -	\$ -	\$ 2,700,000
47										
48	OTHER REVENUES (NON-SUNNYVALE):									
49	Individual donors, Season of Sharing, County of Santa Clara, City of Sunnyvale, Corporate and Non-Profit funders					\$ 445,790	\$ 460,670	\$ -	\$ -	\$ 906,460
50						\$ -	\$ -	\$ -	\$ -	\$ -
51						\$ -	\$ -	\$ -	\$ -	\$ -
52						\$ -	\$ -	\$ -	\$ -	\$ -
53	TOTAL OTHER REVENUES					\$ 445,790	\$ 460,670	\$ -	\$ -	\$ 906,460
54										
55	TOTAL SUNNYVALE + OTHER REVENUES					\$ 1,795,790	\$ 1,810,670	\$ -	\$ -	\$ 3,606,460
56	Rev-Exp (Budget Match Check)					\$ 445,790	\$ 460,670	\$ -	\$ -	\$ 906,460
57										
58	Total Adjusted Salary FTE (All Budgets)					3.05	3.02	0.00	0.00	0.00
59										
60	Approved by:	Marie Bernard								
61	Title:	Executive Director								
62	Phone Number :	(408) 738-0121								
63	Email:	mbernard@svcommunityservices.org								

	A	B	C	D	E	F	J
1	City of Sunnyvale Housing Division						
2	APPENDIX B, BUDGET						
3	Document Date	2/27/2024					
4	Contract Term	Begin Date	End Date	Duration (Years)			
5		7/1/2024	6/30/2026	2			
6	Proposer Name	Sunnyvale Community Services					
7	Program	Sunnyvale TBRA					
8	Budget Name	TBRA Program					
9	Maximum Funding:	\$ 2,700,000					
10					Year 1	Year 2	All Years
11					7/1/2024 - 6/30/2025	7/1/2025 - 6/30/2026	7/1/2024 - 6/30/2026
12					12 Months	12 Months	New
13					New	New	
14							
15	EXPENDITURES						
16	Salaries & Benefits				\$ 247,888	\$ 252,325	\$ 500,213
17	Operating Expenses				\$ 92,112	\$ 87,675	\$ 179,787
18	Subtotal				\$ 340,000	\$ 340,000	\$ 680,000
19	Indirect Percentage						
20	Indirect Cost (Line 18 X Line 19)				\$ 10,000	\$ 10,000	\$ 20,000
21	Other Expenses (Not Eligible for indirect %)				\$ -	\$ -	\$ -
22	Direct Client Expenditures				\$ 1,000,000	\$ 1,000,000	\$ 2,000,000
24	TOTAL EXPENDITURES				\$ 1,350,000.00	\$ 1,350,000.00	\$ 2,700,000
25							
26	CITY OF SUNNYVALE REVENUES:						
27	HOME				\$1,000,000	\$ 1,000,000	\$2,000,000
28	HMF				\$ 100,000	\$ 100,000	\$ 200,000
29	Low-Mod Housing Fund				\$ 250,000	\$ 250,000	\$ 500,000
46	TOTAL SUNNYVALE REVENUES				\$ 1,350,000	\$ 1,350,000	\$ 2,700,000
47							

	A	B	C	D	E	F	J
1	City of Sunnyvale Housing Division						
2	APPENDIX B, BUDGET						
3	Document Date	2/27/2024					
4	Contract Term	Begin Date	End Date	Duration (Years)			
5		7/1/2024	6/30/2026	2			
6	Proposer Name	Sunnyvale Community Services					
7	Program	Sunnyvale TBRA					
48	OTHER REVENUES (NON-SUNNYVALE) (Enter)						
49	Individual donors, Season of Sharing, County of Santa Clara, City of Sunnyvale, Corporate and Non-Profit funders				\$ 445,790	\$ 460,670	\$ 906,460
50							\$ -
51							\$ -
52							\$ -
53	TOTAL OTHER REVENUES				\$ 445,790.00	\$ 460,670.00	\$ 906,460.00
54							
55	TOTAL SUNNYVALE + OTHER REVENUES				\$ 1,795,790	\$ 1,810,670	\$ 3,606,460
56	Rev-Exp (Budget Match Check)				\$ 445,790	\$ 460,670	\$ 906,460
57							
58							
59							
60	Approved by:	Marie Bernard					
61	Title:	Executive Director					
62	Phone Number :	(408) 738-0121					
63	Email:	mbernard@svcommunityservices.org					

	A	B	C	D	H
1	City of Sunnyvale Housing Division				
2	OPERATING DETAIL				
3	Document Date	2/27/2024			
4	Proposer Name	Sunnyvale Community Services			
5	Program	Sunnyvale TBRA			
6	Budget Name	TBRA Program			
7					
8			Year 1	Year 2	All Years
9			7/1/2024 - 6/30/2025	7/1/2025 - 6/30/2026	7/1/2024 - 6/30/2026
10			12 Months	12 Months	
12	OPERATING EXPENSES		Budgeted Expense	Budgeted Expense	Budgeted Expense
13	Rental of Property				\$ -
14	Utilities(Elec, Water, Gas, Phone, Scavenger)				\$ -
15	Office Supplies, Postage				\$ -
16	Building Maintenance Supplies and Repair				\$ -
17	Printing and Reproduction				\$ -
18	Insurance				\$ -
19	Staff Training	\$ 5,000			\$ 5,000
20	Staff Travel-(Local & Out of Town)				\$ -
21	Rental of Equipment				\$ -
22	Motel Assistance	\$ 15,000	\$ 15,000		\$ 30,000
23	Critical Needs Assistance (e.g., utilities, moving costs, medical bills, storage)	\$ 65,000	\$ 65,000		\$ 130,000
24	Software Licenses	\$ 5,112	\$ 5,675		\$ 10,787
25	Computers/equipment/phone	\$ 2,000	\$ 2,000		\$ 4,000
26					\$ -
27					\$ -
28					\$ -
55	Consultants:				
56					
57					
58					
59					
60					
61					
62					
63					
67	TOTAL OPERATING EXPENSES	\$ 92,112	\$ 87,675		\$ 179,787
68					
69	OTHER EXPENSES (Not Eligible for Indirect Cost %)				
70					
71					
72					
75					\$ -
80	Subcontractors:				
81					
82					
90	Subcontractor indirect	\$ -	\$ -		\$ -
91					
92	TOTAL OTHER EXPENSES	\$ -	\$ -		\$ -
93					
94	DIRECT CLIENT EXPENSES				
95	Tenant Subsidies & Security Deposit Assistance	\$ 1,000,000	\$ 1,000,000		\$ 2,000,000
96					\$ -
97					\$ -
98					\$ -
102					
103	TOTAL DIRECT CLIENT EXPENSES	\$ 1,000,000	\$ 1,000,000		\$ 2,000,000

	A	B	C	D	E	F	G	H	I	J	K	L	AB
1	City of Sunnyvale Housing Division												
2	SALARY & BENEFIT DETAIL												
3	Document Date	2/27/2024											
4	Proposer Name	Sunnyvale Community Services											
5	Program	Sunnyvale TBRA											
6	Budget Name	TBRA Program											
7													
8													
9		Year 1					Year 2						
10		Agency Totals		For Sunnyvale Funded Program		7/1/2024 - 6/30/2025	Agency Totals		For Sunnyvale Funded Program		7/1/2025 - 6/30/2026	7/1/2024 - 6/30/2026	
11	12 Months					12 Months							
12	New					New							
		Annual Full Time Salary (for 1.00 FTE)	Position FTE	% FTE funded by this budget	Adjusted Budgeted FTE	Budgeted Salary	Annual Full Time Salary (for 1.00 FTE)	Position FTE	% FTE funded by this budget	Adjusted Budgeted FTE	Budgeted Salary	Budgeted Salary	
13	POSITION TITLE												
14	TBRA Program Manager	\$ 77,240	1.00	100%	1.00	\$ 77,240	\$ 79,557	1.00	100%	1.00	\$ 79,557	\$ 156,797	
15	TBRA Housing Specialist	\$ 59,987	1.00	100%	1.00	\$ 59,987	\$ 61,787	1.00	100%	1.00	\$ 61,787	\$ 121,774	
16	TBRA Case Manager	\$ 59,987	1.00	100%	1.00	\$ 59,987	\$ 61,787	1.00	100%	1.00	\$ 61,787	\$ 121,774	
17	Data Analyst	\$ 81,327	1.00	5%	0.05	\$ 4,321	\$ 83,767	1.00	2%	0.02	\$ 2,011	\$ 6,332	
18						\$ -					\$ -	\$ -	
19						\$ -					\$ -	\$ -	
20						\$ -					\$ -	\$ -	
21						\$ -					\$ -	\$ -	
22						\$ -					\$ -	\$ -	
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51						\$ -					\$ -	\$ -	
52						\$ -					\$ -	\$ -	
53						\$ -					\$ -	\$ -	
54						\$ -					\$ -	\$ -	
55						\$ -					\$ -	\$ -	
56		TOTAL SALARIES				\$ 201,535	TOTAL SALARIES				\$ 205,142	\$ 406,677	
57	TOTAL FTE :	3.05					3.02						
58	FRINGE BENEFIT RATE:	23.00%					23.00%						
59	EMPLOYEE FRINGE BENEFITS:	\$ 46,353.00					\$ 47,183.00				\$ 93,536		
60	TOTAL SALARIES & BENEFITS:	\$ 247,888					\$ 252,325				\$ 500,213		
61													

	A	B	C	D	E
2	<b>BUDGET NARRATIVE</b>				
3	<b>TBRA Program</b>				
4	<b>Salaries &amp; Benefits</b>	<u>Adjusted Budgeted FTE</u>	<u>Budgeted Salary</u>	<u>Justification</u>	<u>Calculation</u>
	TBRA Program Manager	1.00	\$ 79,557	Responsible for providing technical assistance regarding planning, directing, coordinating, supervising and monitoring the administration and day-to-day activities of the HOME Tenant Based Rental Assistance (TBRA) Program including: managing funding and reporting requirements. Establishes systems and procedures designed to assure the achievement of program performance standards and schedules.	
5	TBRA Housing Specialist	1.00	\$ 61,787	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 contracts. Manage annual subsidy recertifications program exits.	
6	TBRA Case Manager	1.00	\$ 61,787	Provide support to the individual, family, and coordinate a variety of service activities while assisting individuals to develop self-identified goals. Develop Individual Service Plans for individuals receiving program services and monitor the plan. Create alternative housing plans for households ready to exit program.	
7	Data Analyst	0.02	\$ 2,011	HMS and Salesforce Client Database administration.	
8			\$ -		
9			\$ -		
10	TOTAL	3.02	\$ 205,142		
11	Employee Fringe Benefits	23%	\$ 47,183	Includes FICA, SSUI, Workers Compensation and Medical calculated at 23% of total salaries.	
12	TOTAL SALARIES & BENEFITS		\$ 252,325		
13					
14					
15	<b>Operating Expenses</b>	<u>Budgeted Expense</u>	<u>Justification</u>	<u>Calculation</u>	
16	Rental of Property	\$ -			
17	Utilities(Elec, Water, Gas, Phone, Scavenger)	\$ -			
18	Office Supplies, Postage	\$ -			
19	Building Maintenance Supplies and Repair	\$ -			
20	Printing and Reproduction	\$ -			
21	Insurance	\$ -			
22	Staff Training	\$ 5,000	Housing Quality Inspection Certification.		
23	Staff Travel-Local & Out of Town)	\$ -			
24	Rental of Equipment	\$ -			
	Motel Assistance	\$ 15,000	Responsible for providing technical assistance regarding planning, directing, coordinating, supervising and monitoring the administration and day-to-day activities of the HOME Tenant Based Rental Assistance (TBRA) Program including: managing funding and reporting requirements. Establishes systems and procedures designed to assure the achievement of program performance standards and schedules.		
25	Critical Needs Assistance (e.g., utilities, moving costs, medical bills, storage, car repairs)	\$ 65,000	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 contracts. Manage annual subsidy recertifications program exits.		
26	Software Licenses	\$ 5,675	Provide support to the individual, family, and coordinate a variety of service activities while assisting individuals to develop self-identified goals. Develop Individual Service Plans for individuals receiving program services and monitor the plan. Create alternative housing plans for households ready to exit program.		
27	Computers/equipment/phone	\$ 2,000	HMS and Salesforce Client Database administration.		
28		\$ -			
29		\$ -			
30	Consultants:	\$ -			
31		\$ -			
32		\$ -			
33		\$ -			
34	TOTAL OPERATING EXPENSES	\$ 92,675			
35	Indirect Cost	\$ -			
36					
37					
38					
39	<b>Other Expenses (not subject to indirect cost %)</b>	<u>Amount</u>	<u>Justification</u>	<u>Calculation</u>	
40		\$ -			
41		\$ -			
42	Subcontractors:				
43		\$ -			
44		\$ -			
45	Subcontractor indirect	\$ -			
46	TOTAL OTHER EXPENSES	\$ -			
47					
48					
49	<b>DIRECT CLIENT EXPENSES</b>	<u>Amount</u>	<u>Justification</u>	<u>Calculation</u>	
50	Tenant Subsidies & Security Deposit Assistance	\$ 1,000,000			
51		\$ -			
52		\$ -			
53	TOTAL DIRECT CLIENT EXPENSES	\$ 1,000,000			
54					
55					
56					