



Mike Levine, Executive Director

Daniel Lurie, Mayor

To	Homelessness Oversight Commission
Through	Mike Levine, Executive Director
From	Marion Sanders, Chief Deputy Director Dylan Schneider, Interim Deputy Director of Administration and Finance Edilyn Velasquez, Director, Contracts
Date	August 6, 2026
Subject	Contract Agreement Approval: Hatchuel Tabernik & Associates, Inc. Housing Expungement and Recovery through Treatment and Support Services Evaluation

<i>Agreement Information</i>	
FSP#	1000038821
Provider	Hatchuel Tabernik & Associates, Inc.
Program Name	Housing Expungement and Recovery through Treatment and Support Services Evaluation
Agreement Action	Original Agreement
Agreement Term	September 1, 2026 – June 30, 2028

Agreement Amount

New	Contingency¹	Total Not to Exceed (NTE)
\$200,000	\$40,000	\$240,000

<i>Funding Information</i>	
Funding Sources²	Proposition 47

The Department of Homelessness and Supportive Housing (HSH) Contracts team requests authorization to enter into a new contract agreement with Hatchuel Tabernik & Associates, Inc. (HTA) for the provision of Housing Expungement and Recovery through Treatment and Support Services (HEARTSS) Evaluation for the period of September 1, 2026 to June 30, 2028. This new agreement is for new services.

Background

In San Francisco, a significant sub-segment of justice-involved individuals are at particularly acute risk of homelessness, poor health outcomes, and recidivism. To address these needs, San Francisco established the Housing, Expungement, and Recovery through Treatment & Support Services (HEARTSS) Program. The goal of this program is to reduce incarceration and recidivism and advance stability through housing and recovery, focusing on justice-involved individuals in San Francisco who have mental health and/or substance use disorder (SUD), with a particular emphasis on providing participants with culturally and linguistically requested support services. The HEARTSS Program is funded by a state grant from the Board

¹ Contingency only applied to FY 26-27 to FY 27-28 budgeted amount.

² The funding sources listed reflect current and future years.

of State and Community Corrections (BSCC) under the Proposition 47 Grant Program. HSH is the lead agency for Cohort 4 of this program.

The HEARTSS program will connect individuals to and provide housing support such as navigation and assistance, expungement services, substance abuse treatment, bridge housing, and other case management services. These services will be delivered by city agencies/departments and non-governmental organizations rooted in the community. A majority of these services were set to begin on July 1, 2026.

BSCC requires that all grantees collect data and conduct an evaluation of its Proposition 47 programs. This includes providing quarterly updates on clients served, conducting a final evaluation of the program, and reporting on recidivism outcomes for clients served.

Services to be Provided

The purpose of the contract is to conduct data collection activities and an evaluation of San Francisco's HEARTSS program. This includes, but is not limited to, refining and finalizing the local evaluation plan; designing, conducting, and analyzing data collection activities such as stakeholder interviews, client focus groups, site visits, and surveys; collecting and analyzing secondary data; providing required data to the State including quarterly participant data and annual recidivism data; organizing and facilitating meetings; assisting with developing policies and procedures; and creating a final evaluation report.

Selection

Contractor was selected through Request for Qualifications (RFQ) #157 Professional Consulting Services, which is valid until September 2036.

Agreement Materials

- HOC Approval Package
 - Appendix A, Services to be Provided
 - Appendix B, Budget



**Appendix A, Services to be Provided
by
Hatchuel Tabernik & Associates, Inc.
HEARTSS Evaluation**

I. Purpose of Contract

The purpose of this contract is to provide evaluation of Housing Expungement and Recovery through Treatment and Support Services (HEARTSS). HEARTSS is focused on serving adults who are involved with the criminal justice/legal system and have a substance abuse disorder and/or mental health issues with culturally and linguistically appropriate support services that promote stability. HEARTSS is funded by California's Board of State and Community Corrections (BSCC) and is the fourth cohort of [Proposition 47](#).

II. Description of Services

Contractor shall provide the following services during the term of the contract:

Deliverables and Tasks	Timeline (FY26-27)	Timeline (FY27-28)
A. Policies and Procedures		
Tasks include: • In collaboration with the Department of Homelessness and Supportive Housing (HSH), ensure program policies and procedures across HEARTSS programs are standardized, fair, clear, and responsive to the needs of justice-involved participants by developing: ○ Detailed and structured documentation outlining the referral protocol; ○ Quality control procedures (e.g., a process for tracking program-related activity); ○ A visual representation of the referral processes; ○ Project workflows that integrate program completion milestones; and ○ Updated policies and procedures (e.g., program summaries, operating manuals, referral protocols) as the project evolves. • Monitor and track referrals to ensure all is running smoothly	September 1, 2026 – June 30, 2027	July 1, 2027 – June 30, 2028
B. Local Evaluation Plan		
Tasks include: • In collaboration with HSH, develop and finalize measures to assess whether the program is achieving its goals and objectives and develop a strategy for participant and provider feedback. • Revise the interim Local Evaluation Plan (LEP) accordingly and ensure that the LEP meets all BSCC requirements. The LEP will be used to evaluate the	September 1, 2026 – June 30, 2027	July 1, 2027 – June 30, 2028

effectiveness of project components and describe the following components: ○ Project background; ○ Logic model; ○ Data collection, management and analysis plan; ○ Process evaluation method and design; and ○ Outcome evaluation method and design. • Share the LEP with HSH staff for feedback and approval prior to submission to the BSCC. • Ensure that the LEP is approved by the BSCC Program Officer. Revise as needed until approval is secured.		
C. Data Collection Tools and MOUs		
Tasks include: • Develop data collection tools, in collaboration with HSH, that are required to conduct the evaluation as described in the LEP. This includes but is not limited to, partner case logs, key stakeholder focus group and/or interview protocols, surveys, service data spreadsheets, intake / referral forms, service delivery records, other program documents, and data requests for administrative data such as health or jail records and individualized housing support plans. • Train all program staff on eligibility criteria, referral protocol and data collection protocols, and use of data collection forms, and update and/or revise protocols and data collection forms as needed. • Ensure that data-sharing MOUs and protocols are in place with City partners and community service providers to secure secondary data for clients and ensure the security of any stored data. • Identify and establish communication and MOU with source of recidivism data and, in collaboration with HSH, determine if we will be adding a local definition in addition to the BSCC definition.	September 1, 2026 – June 30, 2027	July 1, 2027 – June 30, 2028
D. Data Collection, Analysis, and Reporting		
Tasks include: • Lead and organize site visits, interviews and/or focus groups, and surveys with key stakeholders and clients, as identified in the LEP, either virtually or in person, on an annual or as needed basis for the full contract cycle. The final number of sessions will be determined in collaboration with the project director. Analyze the data collection and write up summaries of these activities.	September 1, 2026 – June 30, 2027	July 1, 2027 – June 30, 2028

• Coordinate with City partners on recruitment for client activities and compensation for participation. • Compile secondary data (e.g., case logs, service delivery records, other program documents, meeting minutes) from HSH and project partners. Analyze this data on a quarterly basis across the entire contract period in support of required BSCC reporting. • Provide technical assistance with data collection and instruments, as needed, and in coordination with HSH. • Train all program staff on collecting data required for the quarterly reports, including the de-identified participant data template. • Ensure that the required reporting fields for the quarterly de-identified participant data are also included in the project's data collection protocol. Update the reporting fields and protocol as needed based on reporting requirements. • Ensure partner organizations can provide the necessary information to complete quarterly reporting and prepare progress updates, as required by the BSCC. • Produce the quarterly BSCC progress reports. This includes filling out the De-Identified Participant Data Template based on the data collected and analyzed and drafting quarterly data reports. • In addition to the LEP, prepare the following reports as required for BSCC contract compliance and in accordance with BSCC reporting deadlines: Annual Recidivism Reports, Final Evaluation Report (due June 30, 2028), and other interim evaluation reports as requested. The Contractor shall seek feedback and approval from HSH prior to finalizing these reports. • Prepare and present interim and final evaluation updates and results on an as-needed basis including but not limited to meetings with the HEARTSS local advisory committee.		
E. Project Administration and Advisory Meetings		
Tasks include: • Meet with HSH on a regular basis, at least monthly, prepare documentation (e.g., progress reports), and participate in site visits with HSH, program partners and the BSCC as requested. • Organize and facilitate quarterly in-person advisory committee / implementation team meetings with	September 1, 2026 – June 30, 2027	July 1, 2027 – June 30, 2028

program partners and HSH, either at a location of mutual convenience or virtually. • Provide additional project administration and technical assistance as needed.		
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III. Service Requirements

- A. Contractor shall establish a written Memoranda of Understanding (MOU) with subcontractor/s.
- B. Meetings: Contractor shall attend meetings as requested by HSH.
- C. Diversity, Equity, and Inclusion: The Department is committed to a culture of inclusion in which our differences are celebrated. This includes foundational perspectives that everyone should have equitable access to what they need to thrive no matter their race, age, ability, gender, sexual orientation, ethnicity, or country of origin and that a diverse and inclusive workforce will produce more creative and innovative outcomes for the organization, and ultimately, its clients. And the Department is committed to addressing the disparate impact of historical limits on access to governmental services and advancing equity in all aspects of our work, ensuring access to services, and providing support to all communities to ensure their ability to succeed and thrive. Therefore, Contractor shall maintain organizational plans, strategies, and activities to address diverse, equitable, and inclusive access to services provided by Contractor under the Services, as well as internal controls to regularly review current practices through the lens of diversity, equity, and inclusion to identify areas of improvement. This includes but is not limited to: the organizational mission and/or inclusion statements; non-discrimination documents; community outreach plans; plans to increase diverse applicants for staff positions; communication strategies to address program recipients who have historically been excluded from participation; and staff training activities on diversity, equity, and inclusion.
- D. Confidentiality:
 1. Contractor shall comply with applicable federal, state, and local laws that govern the confidentiality, privacy, and security of client data shared between Contractor, HSH, and other providers if those laws apply for the purposes described in the Contract Plan, including but not limited to: U.S. Department of Housing and Urban Department (2004) Homeless Management Information Systems (HMIS) Data and Technical Standards Final Notice and 24 C.F.R. Part 578, Continuum of Care.
 2. Contractor shall safeguard the confidentiality of all client data by (a) ensuring the security and integrity of all client data; (b) maintaining computers and other information systems and technology infrastructure that it uses to create, receive, maintain, use, or transmit client data in a secure manner; (c) protecting against any anticipated threats or hazards to the security and integrity all client data; (d)

protecting against unauthorized disclosure, access, or use of all client data; (e) ensuring the proper disposal of client data; and (f) ensuring that all of Contractor's employees, agents, and subcontractors, if any, comply with all of the foregoing.

3. Contractor shall immediately notify HSH upon receipt of any subpoenas, service of process, litigation holds, discovery requests and other legal requests ("Legal Requests") related to client data shared under this Contract Plan or which in any way might reasonably require access to client data, and in no event later than twenty-four (24) hours after Contractor receives the request. Contractor shall not respond to Legal Requests without first notifying City.
 4. In the event that Contractor becomes aware of a breach that results in a confirmed unauthorized disclosure that compromises the security, confidentiality, or integrity of client data, Contractor shall, as applicable: (a) notify HSH immediately following discovery, but no later than 48 hours, of such confirmation; (b) coordinate with HSH in its breach response activities; (c) perform or take any other actions required to comply with applicable law as a result of the occurrence; (d) provide to HSH a detailed plan within 10 calendar days of the occurrence describing the measures Contractor will undertake to prevent a future occurrence; and (e) assist HSH upon request and/or as directed in providing notice and/or monitoring to affected individuals in compliance with applicable law.
 5. Contractor staff shall complete the City's compliance and privacy training upon hire. Contractor shall have a privacy compliance policy and best practices training for staff that Contractor must review and update on an annual basis or in response to a data breach. Contractor shall provide a copy of the current policy, training materials, and attendance sheets when requested by HSH Privacy Officer.
- E. Language and Interpretation Services: Contractor shall ensure that translation and interpreter services are available, as needed. Contractor shall address the needs of and provide services to the served population who primarily speak language(s) other than English. Additional information on Language Access standards can be found on the HSH Providers Connect website: <https://sfgov1.sharepoint.com/sites/HOM-Ext-Providers>.
- F. Data Ownership:
1. The City will retain ownership and rights to the data collected, including derivative works made from the data and the licensing applied to the data.
 2. All rights, including all intellectual property rights, in and to the data and any derivative works of the data shall remain the exclusive property of the City.
 3. The Contractor must not have ownership and usage rights to the data except to provide the service.
 4. The Contractor is provided a limited non-exclusive license to use the data solely for performing its obligations under the Contract and not for the Contractor's own purposes or later use. Nothing herein shall be construed to confer any license or

right to the data by implication, estoppel or otherwise, under copyright or other intellectual property rights, to any third party. Unauthorized use of the data by the Contractor is prohibited. For purpose of this requirement, the phrase “unauthorized use” means the data mining or processing of data, stored or transmitted by the service, for unrelated commercial purposes, advertising or advertising-related purposes, or for any other purpose other than security or service delivery analysis that is not explicitly authorized by the City.

IV. Reporting Requirements

- A. Contractor shall provide a report of activities and findings, based on the frequency described in the Description of Services sections.
- B. Contractor shall provide Ad Hoc reports and presentations as required by the Department and respond to requests by the Department in a timely manner.

For assistance with reporting requirements or submission of reports, contact the assigned Contract and Planning contacts.

City and County of San Francisco - Department of Homelessness and Supportive Housing
Appendix B Budget

Document Date:	7/20/2026	
Contract Term	Begin Date	End Date
	9/1/2026	6/30/2028
Organization	Hatchuel Tabernik & Associates, Inc.	
Program	HEARTSS Evaluation	
F\$P	1000038821	
Effective Date	9/1/2026	
Budget Name	HEARTSS Evaluation	
Funding	Current	
Budget Total	\$	200,000
Contingency	\$	40,000
Not-to-Exceed	\$	240,000

		Year 1 9/1/2026 - 6/30/2027	Year 2 7/1/2027 - 6/30/2028	All Years 9/1/2026- 6/30/2028
Deliverables	Tasks	Budget	Budget	Budget
A. Policies and Procedures	Document program policies and procedures and update as needed	\$ 9,550	\$ 2,100	\$ 11,650
	Monitor and track referrals			
	Subtotal	\$ 9,550	\$ 2,100	\$ 11,650
B. Local Evaluation Plan	Revise Local Eval Plan for BSCC and re-submit if necessary	\$ 974	\$ -	\$ 974
	Subtotal	\$ 974	\$ -	\$ 974
C. Data Collection Tools and MOUs	Develop data collection tools and instruments	\$ 9,962	\$ 4,423	\$ 14,385
	Train staff on referral and data collection processes and evaluation data collection tools/instruments			
	Establish MOUs as appropriate including for recidivism data			
	Subtotal	\$ 9,962	\$ 4,423	\$ 14,385
D. Data Collection, Analysis, and Reporting	Lead and organize data collection activites with key stakeholders and clients; analyze the data collection	\$ 58,663	\$ 79,453	\$ 138,116
	Compile and analyze secondary data			
	Prepare and submit reports as required for BSCC contract compliance including: annual recidivism reports, quarterly progress reports, the Final Evaluation Report, and other interim evaluation reports			
	Train and collect information from partner organizations as needed for quarterly reports to BSCC			
	Prepare and present on evaluation updates / results			
	Provide any other TA as needed with data collection and instruments			
	Subtotal	\$ 58,663	\$ 79,453	\$ 138,116
E. Project Administration and Advisory Meetings	Meet and communicate with HSH regularly, prepare documentation, and participate in site visits as requested	\$ 20,850	\$ 14,025	\$ 34,875
	Organize and facilitate quarterly meetings with program partners and HSH			
	Provide additional project administration & TA as needed			
	Subtotal	\$ 20,850	\$ 14,025	\$ 34,875
Total Costs		\$ 100,000	\$ 100,000	\$ 200,000
Revenue	Prop 47	\$100,000	\$100,000	\$ 200,000
Revenue - Cost (Budget Match Check)				\$ 0

DEPARTMENT OF HOMELESSNESS AND SUPPORTIVE HOUSING
APPENDIX B, BUDGET

Document Date	6/2/2026	0	
Contract Term	Begin Date	End Date	Duration (Years)
Current Term	9/1/2026	12/31/2027	2
Approved Subcontractors			
Hannah Peters (Spanish language support)			

HTA -HEARTSS Evaluation

HTA Consultants		
Name	FY 26/27 Rates	FY 27/28 Rates
Danielle Toussaint	\$275.00	\$285.00
Kristie Glatze	\$225.00	\$235.00
Mayte Cruz	\$200.00	\$210.00
Rachel Maas	\$200.00	\$210.00
Molly Creighton	\$200.00	\$210.00
Kirsten Piroth	\$175.00	\$185.00
Hannah Peters	\$150.00	\$160.00