

# COB - BOSAIR FORM

01/30/2026 4:10 PM (MST)

Submitted by Christina.Drennan2@pima.gov



## BOARD OF SUPERVISORS AGENDA ITEM REPORT (BOSAIR)

**\*All fields are required. Enter N/A if not applicable. For number fields, enter 0 if not applicable.\***

Record Number:

Amplifund Grant Record Number: 95726

Award Type: Grant

Is a Board Meeting Date Requested? Yes

Requested Board Meeting Date: 03/03/2026

Signature Only:

NO

Procurement Director Award / Delegated Award: • N/A

Supplier / Customer / Grantor / Subrecipient: City of Tucson Housing and Community Development Department

Project Title / Description: Choice Neighborhoods - Supportive Services

**Purpose:** The Pima County Health Department (PCHD) is working to address the unmet needs and barriers to health care and mental health services that contribute to poor health outcomes and negatively impact quality of life for folks residing at Tucson House and in the surrounding community. PCHD was selected as the lead partner on the People-Health component of the City of Tucson's Choice Neighborhood Implementation Grant for the Thrive in the '05 Zone, which has enormous potential to improve a system of care and lift the quality of life for people at Tucson House and the surrounding communities who face significant barriers and multiple vulnerabilities. It will also provide an opportunity for PCHD and City of Tucson partners to develop a model for delivering place based integrated health and wellbeing services, that can be replicated to improve access to care and health outcomes in other parts of the City and County.

As an electronic signature has been requested on the award by the grantor, acceptance of this award would delegate signing authority to Ken Walker, Director of Grants Management & Innovation, or his designee on behalf of Pima County.

Procurement Method: Grant: Not applicable

Procurement Method Additional Info: N/A

Program Goals/Predicted Through the Choice Neighborhoods - Supportive Services project, Tucson House

**Outcomes:** residents will have increased access to health and wellbeing wrap-around services, improved physical and mental health over time, and have increased health literacy skills and supports to navigate local health and social service systems.

**Public Benefit and Impact:** The City of Tucson Housing and Community Development Department, the Pima County Health Department, and the Pima County Community and Workforce Development Department will coordinate with Tucson House residents and community stakeholders, including health and social service providers, to improve outcomes for Tucson House residents in the areas of income & employment, health, and early childhood education.

The Pima County Health Department will take the lead on the health component of the above-mentioned plans. Key strategy's in the health component of this plan include increasing access to care, improving health literacy, and providing health navigation to coordinate health and social services.

**Budget Pillar** • Improve the quality of life

**Support of Prosperity Initiative:** • 4. Increase Health Coverage and Reduce Medical Debt

**Provide information that explains how this activity supports the selected Prosperity Initiatives** The Choice Neighborhoods - Supportive Services project supports this Prosperity Initiative by increasing the number of Tucson House residents who have access to health insurance.

- Metrics Available to Measure Performance:**
- Number of Tucson House residents who will receive regular care through a primary care provider.
    - o Goal: Increase this number.
  - The number of residents receiving care through emergency room visits.
    - o Goal: Decrease this number.
  - Number of Tucson House residents who will have access to health insurance.
    - o Goal: Increase this number.

**Retroactive:** YES

**Retroactive Description:** Yes. PCHD and the Pima County Attorney's Office requested revisions to the original grant agreement. Revision discussions and approvals resulted in the agreement being finalized after the grant start date. If not approved, the start of the Choice Neighborhoods People Plan project will be furthered delayed, which will impact the number of individuals that are served.

**Grant / Amendment Information (for grants acceptance and awards)**

Record Number:

Amplifund Grant Record Number: 95726

**Type:** Award

Department Code: HD

AmpliFund Grant Record Number: 95726

Amendment Number: N/A

Commencement Date: 01/01/2026

Termination Date: 09/30/2028

Advantage Initial GTAW# (If Applicable): N/A

Total Revenue Amount:

\$202,734.00

Total Match Amount

\$0.00

Advantage Grant ID # (If Applicable): N/A

All Funding Source(s) required: U.S. Department of Housing and Urban Development

Does PCAO need to review the grant award (or grant amendment)? YES

Does PCAO need to sign the grant award (or grant amendment)? YES

Match funding from General Fund? NO

Match funding from other sources? NO

Are Federal Funds Involved? YES

If Federal funds are received, is funding coming directly from the Federal government or passed through other organization(s)? From U.S. Department of Housing and Urban Development passed through City of Tucson Housing and Community Development Department.

CFDA# 14.889

FAIN# AZ9E004CNG 122

Department: Health

Name: Christina Drennan

Telephone: 5207247614

GMI Director: Kawal Date: 2/11/2026

Department Director Signature: [Signature] Date: 2/3/2026

Deputy County Administrator Signature: [Signature] Date: 2-11-2026

County Administrator Signature: [Signature] Date: 2-12-2026

**CITY OF TUCSON HOUSING AND COMMUNITY DEVELOPMENT DEPARTMENT  
FISCAL YEAR 2022 CHOICE NEIGHBORHOODS IMPLEMENTATION GRANT  
SUBRECIPIENT AGREEMENT**

This Subrecipient Agreement is made and entered into by and between

**City of Tucson Housing and Community Development Department**  
*a municipal corporation of the State of Arizona,  
hereinafter referred to as the "City"*

and

**Pima County Health Department**  
*an officially designated unit of the County  
hereinafter referred to as the "Agency"*

<b>FUNDING PROGRAM</b>	Choice Neighborhoods Implementation Grant
<b>FUNDING SOURCE</b>	U.S. Department of Housing and Urban Development
<b>ASSISTANCE LISTING NUMBER</b>	14.889
<b>PROJECT NAME</b>	Choice Neighborhoods – Supportive Services
<b>AGENCY SAM UNIQUE ENTITY ID</b>	U8XUY58VDQS3
<b>FEDERAL AWARD ID NUMBER</b>	AZ9EOO4CNG 122
<b>CITY CONTRACT NUMBER</b>	19657
<b>PERFORMANCE/BUDGET PERIOD START DATE</b>	01/01/2026
<b>PERFORMANCE/BUDGET PERIOD END DATE</b>	09/30/2028
<b>SUBAWARD AMOUNT (TOTAL FEDERAL FUNDS OBLIGATED)</b>	\$202,734

**RECITALS**

WHEREAS, the City was awarded U.S. Department of Housing and Urban Development Fiscal Year 2022 Choice Neighborhoods Implementation Grant funds in the amount of \$50,000,000; and

WHEREAS, the City has entered into an agreement with the U.S. Department of Housing and Urban Development to administer Choice Neighborhood Implementation Grant funds; and

WHEREAS, the City has determined that the activities and proposed costs of Agency meet federal program eligibility requirements as defined in the FY 2022 Choice Neighborhoods Implementation Grant Notice of Funding Opportunity, and

WHEREAS, it has been determined that the activities of the Agency are in the public interest, and are such as to improve and promote the public welfare of the City; and

WHEREAS, the Agency has not been debarred or suspended from administering Federal funds; and

NOW THEREFORE, in consideration of the mutual promises and considerations set forth below, the parties agree to the following.

## AGREEMENT

**SCOPE OF SERVICES:** The Agency shall provide the services and activities described in Exhibit A, Scope of Services.

**RESEARCH AND DEVELOPMENT:** This subaward does not include costs for research and development.

**ADMINISTRATIVE AND INDIRECT COSTS:** Pursuant to the Fiscal Year 2022 HUD Choice Implementation Grant Notice of Funding Opportunity Section IV.F.4 and the City's approved Fiscal Year 2022 Choice Neighborhoods Implementation Grant budget, administrative and indirect costs are not eligible for reimbursement under this subaward.

**GRANT ACKNOWLEDGMENT:** Agency shall acknowledge the City's financial support of the Agency's services as provided through this agreement and shall include the City's logo on materials that market, announce or describe the programs and services that are supported by the City's financial participation.

**ELIGIBILITY LIMITATIONS:** Funds awarded through this agreement may only be used to provide services and activities as described in the attached Scope of Services.

**EXTENSION AND RENEWAL:** This Agreement may be amended for up to two additional two-year periods subject to continued availability of federal funds, demand for included services by the target population, acceptable performance of the Agency, and mutual need. Extension offers shall be at the full discretion of the City of Tucson.

**AGREEMENT DOCUMENTS:** The following list constitutes the Contract Documents incorporated as a part of this Agreement:

- Subrecipient Agreement
- General Terms and Conditions
- Exhibit A – Scope of Services
- Exhibit B – Performance Report
- Exhibit C - Project Budget
- Exhibit D – Payment Request Form
- Exhibit E – Agreement Contacts Sheet
- Exhibit F - EEOC Form
- Exhibit G – HUD Drug Free Workplace Certification
- Exhibit H – HUD Certification Regarding Lobbying
- Exhibit I – Subrecipient Determination Form
- Exhibit J – City of Tucson Choice Neighborhoods People Plan
- Exhibit K – Choice Neighborhoods Data-Sharing Agreement

**INCORPORATED BY REFERENCE:** The following constitutes subaward requirements which apply to this subaward, including cross-cutting requirements incorporated therein, and are incorporated by reference as currently published and/or amended during the project period:

U.S. Department of Housing and Urban Development Fiscal Year 2022 Choice Neighborhoods Implementation Grant Notice of Funding Opportunity:

*Available at [https://www.hud.gov/program\\_offices/public\\_indian\\_housing/programs/ph/cn/fy22funding](https://www.hud.gov/program_offices/public_indian_housing/programs/ph/cn/fy22funding).*

Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Award:

*Available at [https://www.ecfr.gov/cgi-bin/text-idx?tpl=/ecfrbrowse/Title02/2cfr200\\_main\\_02.tpl](https://www.ecfr.gov/cgi-bin/text-idx?tpl=/ecfrbrowse/Title02/2cfr200_main_02.tpl)*

**COUNTERPARTS:** This Agreement may be executed in one or more counterparts, each of which shall be deemed an original, but all of which taken together shall constitute one and the same instrument. Confirmation of execution by electronic transmission of a facsimile signature page shall be binding on a party so confirming.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement:

City of Tucson

Agency

E-SIGNED by Ann Chanecka  
on 2026-01-15 17:06:21 GMT

Reviewed and Approved by  
Ann Chanecka, Housing and Community  
Development Director,  
for the City of Tucson, and not Personally

Date: January 15, 2026

E-SIGNED by Jay Calhoun Zenzen  
on 2026-01-26 16:33:05 GMT

Approved as to form – City Attorney's Office  
and not Personally

Date: January 26, 2026

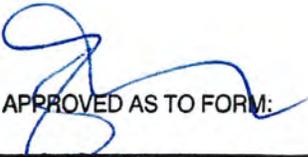
Countersigned for the City Clerk  
and not Personally

Date: \_\_\_\_\_

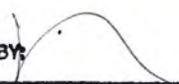
Executed by Authorized Signatory  
and not Personally

\_\_\_\_\_  
Name and Title (typed/printed)

Date: \_\_\_\_\_

  
APPROVED AS TO FORM:

\_\_\_\_\_  
Deputy County Attorney  
**Jonathan Pinkney**

REVIEWED BY: 

\_\_\_\_\_  
Appointing Authority or Designee  
Pima County Health Department

# GENERAL CONDITIONS

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1. **TERM:** The term of this Agreement will begin on the start date of the subaward period of performance set forth in the forepart of this Agreement and end on the end date of the subaward period of performance or the date that the last report or invoice is due, whichever is later, except that this Agreement will remain in effect during any additional period that Agency has control of federal funds provided under this Agreement, including program income.
2. **SCOPE OF SERVICES:** Agency will provide the services (the “**Services**”) described in Exhibit A, Scope of Work. Agency will perform the Services in a manner reasonably satisfactory to City and in accordance with the terms and conditions of this Agreement and applicable federal, state, and local laws and regulations.
3. **SUBAWARD.** Agency acknowledges that the funds being provided under this Agreement are a subaward of Choice Neighborhoods Implementation (CNI) grant funds awarded by the U.S. Department of Housing and Urban Development (the “**Granting Agency**”), as described in this Agreement. Agency will comply with 2 CFR Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards; and with all other laws or regulations listed in any Exhibit to this Agreement.
4. **CITY FUNDING:**
  - 4.1. **Amount.** City will reimburse Agency for its Allowable Costs incurred in providing the Services up to the amount of “Federal Funds Obligated by this Agreement” (the “**Subaward Amount**”) in accordance with the budget in Exhibit C (the “**Budget**”).
  - 4.2. **Allowable Costs.** “Allowable Costs” means the actual costs incurred by Agency in providing the Services, as detailed in the Budget. Allowable Costs do not include costs of CNI-ineligible activities or costs incurred to conduct political activities, inherently religious activities, or lobbying.
5. **BUDGET:** Agency may not deviate from the approved Budget.
  - 5.1. **Budget Adjustment Requests.** To request a Budget adjustment, Agency must submit a written request with an explanation of why the change is necessary and how the Services and the metrics and outcomes in the Scope of Work will continue to be provided.
  - 5.2. **Approvals Necessary.** Changes between Budget line items of up to 15% may be made by Agency with the prior written consent of the authorized representative of City’s Housing and Community Development Department. Any change that increases or decreases the Subaward Amount or that

materially changes the Scope of Work must be implemented through a formal amendment of this Agreement.

6. **INVOICES:** Agency will submit to City a monthly invoice for reimbursement of Allowable Costs (“**Reimbursement Request**”), including a summary report of expenditures by Budget line item, in a form provided by or approved by City.
  - 6.1. **Expenditure Detail.** Agency must attach a detailed itemized list of expenditures, along with supporting documentation, to each Reimbursement Request.
  - 6.2. **Personnel Costs.** For personnel costs, Agency must provide time sheets or other records, signed by the employee and the employee’s immediate supervisor with direct knowledge of the employee’s work, specifying the days, hours per day, and total hours worked providing the funded Services, as well as accounting system reports showing the employee’s rate of pay and cost of employer-paid benefits.
  - 6.3. **Timing.** Each Reimbursement Request must be submitted to City by the 20<sup>th</sup> calendar day of the month following the month in which the expenditures were made. In the event that the 20<sup>th</sup> calendar day falls on a weekend or City holiday, Agency will submit the reimbursement request on or before the next business day. The final Reimbursement Request must be submitted by the 20<sup>th</sup> day of the month following the end of the performance period.
  - 6.4. **Unexpended Funds.** Agency will monitor its monthly expenditures to ensure that the entire Subaward Amount is expended in a timely manner. City may reduce the Subaward Amount during the performance period if Agency’s Reimbursement Requests show that it is not expending the Subaward Amount as anticipated. City will provide Agency written notice of its intent to do so and Agency will have 30 days from the date of notice to correct the issue. If the Allowable Costs incurred are less than set forth in the Budget, Agency must provide a letter stating why there were funds left at the end of the grant year.
  - 6.5. **Payment and Set-Off.** City will pay Agency its Allowable Costs within 30 days of receipt of an eligible and complete Reimbursement Request. City may withhold from any payment amounts to compensate City for any damages sustained by City as a result of any default by Agency under this Agreement, including any Granting Agency disqualification of activities funded because of Agency’s failure to properly administer audit or report activities, services and/or expenditures.
  - 6.6. **Availability.** City’s obligation to reimburse Agency for Allowable Costs under this Agreement is conditioned on the City’s receipt of the federal grant money that is being used to fund this Agreement. If the Granting Agency for any reason reduces or eliminates City’s funding, City and Agency may agree to reduce the funding and Scope of Work under this Agreement, or City may terminate this Agreement.
  - 6.7. **Refunds.** If City determines that payments it has made under this Agreement exceeded actual Allowable Costs for satisfactorily completed Services, Agency will promptly refund the excess amount to City.
7. **PROGRAM INCOME:** If the activities funded under this Agreement result in program income, Agency will, on or before the 15<sup>th</sup> calendar day of each month, pay to City all Program Income collected in the previous month, unless stated otherwise in the Scope of Work. In the event that the 15<sup>th</sup> calendar day falls on a weekend or City holiday, Agency will submit the reimbursement request on or before the next business day.
8. **ASSETS:** Agency will ensure that any real property under Agency’s control that was acquired or improved in whole or in part with funding provided under this Agreement is used in compliance with 2

CFR 200 requirements and, notwithstanding Section 9, will maintain records regarding the property for at least five years after expiration of this Agreement, unless a longer period of time is specified elsewhere in this Agreement.

**9. RECORDS:**

9.1. **Records Required.** Agency will maintain thorough records of all transactions and activities funded under this Agreement.

9.2. **Retention Period.** Agency will retain those records, at a minimum, until the date that is five years after (i) this Agreement expires or is terminated, or (ii) City submits its final performance report for the CNI grant.

9.3. **Record Inspections.** Agency will give City and the Granting Agency access to and the right to examine and copy all records, books, papers, or documents relating to or arising from all Agency operations funded in whole or in part under this Agreement, during the term of this Agreement and during the retention period set forth above.

**10. REPORTS:** Agency will submit to City on a monthly, quarterly, and/or annual basis, as appropriate to comply with the reporting requirements of the Granting Agency, written reports regarding the activities funded in whole or in part under this Agreement. If the format, content, and timing of reports is not set forth in Exhibit A or elsewhere in this Agreement, City will separately specify the reports that Agency must supply.

**11. MONITORING:**

11.1. **Cooperation.** City will monitor Agency's performance under this Agreement to ensure compliance with applicable federal, state, and local requirements and achievement of program performance goals. Agency will fully cooperate with City and with the Granting Agency with respect to these monitoring efforts.

11.2. **Suspension.** City may suspend Agency's performance of Services and payments under this Agreement with written notice to Agency in order to investigate Agency's activities and compliance with this Agreement. Agency will cooperate fully with the investigation. City will notify Agency in writing at the conclusion of the investigation whether work under this Agreement can be resumed or the Agreement is being terminated under Section 18 below.

**12. INFORMATION:** Subject to any applicable rules and regulations regarding confidentiality, City and the Granting Agency have unrestricted authority to publish, disclose, distribute, and otherwise use, in whole or in part, any reports, data, materials, or other information prepared by Agency or any contractor or subrecipient of Agency under or in conjunction with this Agreement.

**13. AUDITS:** Agency will conduct annual audits in compliance with 2 CFR Part 200, subpart F, covering the performance period under this agreement. Agency will provide a copy of the resulting audit reports to City, along with Agency's response to any audit finding, no later than the date that is the earlier of (i) 30 calendar days after receipt of the auditor's report(s), or (ii) nine months after the end of the audit period. Agency will also conduct any additional audits required by City or the Granting Agency.

**14. CONFLICTS OF INTEREST:** Agency will comply with all applicable conflict-of-interest requirements applicable to the grant from which funds are being provided under this Agreement, including 24 CFR §§ 84.42 and 2 CFR 200.112.

**15. INDEPENDENT CONTRACTOR:** Neither party is the agent, employee, partner, joint venturer, or associate of the other. No employee or agent of one party will be deemed or construed to be the

employee or agent of the other party for any purpose. Neither party will be liable for any debts, accounts, obligations, or other liabilities whatsoever of the other, including (without limitation) the other party's obligation to withhold Social Security and income taxes for itself or any of its employees.

**16. INDEMNIFICATION:** Each party (as Indemnitor) agrees to indemnify, defend and hold harmless the other party (as Indemnitee) from and against any and all claims, losses, liability, costs or expenses (including reasonable attorney's fees) (hereinafter collectively referred to as "claims") for bodily injury of any person (including death) or property damage, but only to the extent that such injury or damage is caused or alleged to be caused by a negligent or intentionally wrongful act or omission of the Indemnitor, or of any of its officers, officials, agents, employees, or volunteers.

**17. INSURANCE:**

**17.1. Required Insurance Policies.** Agency will obtain and maintain during the entire term of this Agreement and for two years after the term of this Agreement ends, the insurance coverage set forth below from insurers that have an "A.M. Best" rating of not less than A-VII.

**17.2. Additional Insured.** The Commercial General Liability Insurance and Commercial Automobile Liability Insurance policies will include City as an additional insured with respect to liability arising out of the performance of this Agreement. City must be covered to the full policy limits, even if those limits of liability are in excess of those required by this Agreement. The coverage must be primary, and any insurance carried by City is excess and not contributing.

**17.3. Additional Requirements.** Each insurance policy required by this Agreement must include or be endorsed to provide the following:

17.3.1. A waiver of subrogation endorsement in favor of City, for losses arising from work performed by or on behalf of Agency (including Workers' Compensation).

17.3.2. The policy is primary, and any insurance carried by City is excess and not contributing.

17.3.3. The coverage provided by the policy is not limited to the liability assumed under the indemnification provisions of this Agreement.

17.3.4. The insurer will provide written notice to City at least 10 calendar days before the policy is terminated or cancelled or the coverage is reduced.

**17.4. Verification of Coverage.**

17.4.1. Agency will give City certificates of insurance (ACORD form or equivalent approved by City), signed by an authorized representative of the insurer, showing that Agency has all the insurance required by this Agreement.

17.4.2. Agency must deliver the certificates directly to City's Housing and Community Development Department before Agency commences work under this Agreement.

17.4.3. The certificates must contain City project/subaward numbers.

17.4.4. City reserves the right to require complete copies of all insurance policies required by this Agreement at any time.

**17.5. Subcontractors.** Agency's insurance certificate(s) must include all subcontractors as insureds under its policies or Agency must give City separate certificates and endorsements for each subcontractor showing that each subcontractor has the insurance coverage described above.

17.6. **Public Entities.** If Agency or any subcontractor is a public entity that self-insures as permitted by law, then the insurance requirements in this Section 17 will not apply to that entity and that entity must instead provide a Certificate of Self- Insurance.

17.7. **Sufficiency of Coverage.** City in no way warrants that the required minimum insurer rating in this Agreement is sufficient to protect Agency from potential insurer insolvency, nor that the required liability limits are sufficient to protect Agency.

<b>COVERAGE</b>	<b>LIMITS OF LIABILITY</b>
<b>I. Commercial General Liability:</b>	
<i>Policy shall include Bodily Injury, Property Damage, Personal Injury, and Broad Form Contractual Liability</i>	
<i>Each Occurrence</i>	\$1,000,000
<i>General Aggregate</i>	\$2,000,000
<i>Products &amp; Completed Operations Aggregate</i>	\$2,000,000
<i>Personal and Advertising Injury</i>	\$1,000,000
<i>Blanket Contractual Liability</i>	\$1,000,000
<b>II. Commercial Automobile Liability</b>	
<i>Policy shall include Bodily Injury and Property Damage for any owned, hired, and/or non-owned vehicles used in the operation, installation, and maintenance of facilities under this Agreement.</i>	
<i>Combined Single Limit</i>	\$1,000,000
<b>III. Workers' Compensation (applicable to the State of Arizona)*1</b>	
<i>Per Occurrence</i>	Statutory
<i>Employer's Liability</i>	\$1,000,000
<i>Disease Each Employee</i>	\$1,000,000
<i>Disease Policy Limit</i>	\$1,000,000
<b>IV. Pollution - Legal Liability</b>	
<i>Each Claim</i>	\$1,000,000
<i>Annual Aggregate</i>	\$1,000,000
<b>V. Fidelity Bonding</b>	
<i>Fidelity Bonding, Employee Dishonesty, Faithful Performance, or applicable crime insurance policy</i>	\$1,000,000

COVERAGE	LIMITS OF LIABILITY
<b>VI. Builders Risk (Applies to Construction/Rehabilitation Projects Only)</b>	
<p><i>Builder's "All Risk" Property Insurance</i></p> <p><i>Coverage to include personal property of others in the care, custody, and control of the Agency. Coverage should be written for 100% of the completed value.</i></p> <p><i>For additions or repairs of existing building structures, coverage to include Agency's interest in improvements, repairs, additions, and alterations to completed buildings and subject to items described in "a." Coverage to Name the City of Tucson as a Loss Payee</i></p>	Not Applicable
<b>VII. Employment Practice Liability Insurance including Third-Party Liability</b>	
	\$1,000,000
<b>VIII. Network Security (Cyber) and Privacy Liability</b>	
<i>Each Claim</i>	\$2,000,000
<i>Annual Aggregate</i>	\$4,000,000
<p><i>Such insurance shall include, but not be limited to, coverage for third-party claims and losses with respect to network risks (such as data breaches, unauthorized access or use, ID theft, and theft of data), invasion of privacy (regardless of the type of media involved in the loss of private information), crisis management, and identity theft response costs. This should also include loss of use, breach notification costs, credit remediation and credit monitoring, defense and claims expenses, regulatory defense costs plus fines and penalties, cyber extortion, computer program and electronic data restoration expenses coverage (data asset protection), network business interruption, computer fraud coverage, and funds transfer loss.</i></p> <p><i>In the event that the Network Security and Privacy Liability insurance required by this Agreement is written on a claims-made basis, Agency warrants that any retroactive date under the policy shall precede the effective date of this Contract and, either continuous coverage will be maintained, or an extended discovery period will be exercised for a period of two years beginning at the time work under this Agreement is completed.</i></p>	
<b>IX. Sexual Abuse and Molestation</b>	
<i>Sexual Abuse and Molestation</i>	\$1,000,000

**18. TERMINATION:**

**18.1. For Cause.**

18.1.1. City may terminate this Agreement for cause if Agency fails to fulfill in a timely and satisfactory manner any of its obligations under this Agreement or violates any provision of this Agreement and fails to cure the default within seven days after receipt of written notice from the City describing the default.

18.1.2. If City terminates this Agreement for cause, City will provide Agency with a written invoice for any sums paid by City for any Services that were not performed by Agency in a timely and satisfactory manner. Agency will pay the invoice within 10 days of receipt. Any sum not paid in a timely manner will accrue interest at the rate of 10% per annum from the date due until paid and Agency will also be responsible for the cost of any collection efforts by the City, including attorneys' fees and costs.

**18.2. For Convenience:**

18.2.1. City may terminate this Agreement at any time by sending Agency a written termination notice stating the effective date of the termination, which cannot be earlier than 30 days after the date of the notice.

18.2.2. Agency may appeal a termination without cause by requesting reconsideration by the Mayor and Council. The request must be in writing, must explain the basis for the appeal, and must be filed with the City Clerk and the Housing and Community Development Department Director no later than 30 days after Agency receives the termination notice. The appeal hearing will be scheduled as soon as reasonably possible and City will inform Agency in writing of the date and time of the hearing, at which Agency may supplement its written appeal. Termination will be suspended until the effective date of the Mayor and Council ruling on Agency's appeal.

18.3. **Conflict of Interest.** This Agreement is subject to termination for a conflict of interest under A.R.S. § 38-511, which is incorporated into this Agreement.

18.4. **Non-appropriation:** This Agreement may be terminated if, for any reason, there are not sufficient appropriated and available monies for the purpose of maintaining City's obligations under this Agreement.

18.5. **Payment for Services.** In the event that this Agreement is terminated, City will have no further obligation to Agency other than payment for Services satisfactorily completed prior to the effective date of the termination.

19. **INTEGRATED DOCUMENT:** This Agreement and the exhibits attached and referenced herein embody the entire Agreement between City and Agency with respect to the Services. No verbal agreements or conversation with any officer, agent, or employee of City prior to or after the execution of this Agreement will be deemed to affect or modify any of the terms or obligations contained in any documents comprising this Agreement.

20. **AMENDMENTS:** This Agreement may be amended only by a written agreement signed by a duly authorized representative of each party.

21. **SEVERABILITY:** The provisions of this Agreement are severable. If any provision or application of a provision of this Agreement is held to be invalid, that will not affect the validity of any other provision or application of a provision that can remain meaningfully effective without the invalidated provision or application.

22. **ASSIGNMENT:** Agency may not assign any of its rights or obligations under this Agreement without the prior written consent of City.
23. **GOVERNING LAW AND VENUE:** This Agreement is governed by the laws of the State of Arizona. Any lawsuits regarding this Agreement must be brought in a court of competent jurisdiction in Pima County, Arizona.
24. **NONDISCRIMINATION:** Agency, in its employment policies and practices, in its public accommodations, and in its provision of Services, will comply with all relevant and applicable federal, state, and local laws, regulations, and standards relating to nondiscrimination including but not limited to Title VII of the Civil Rights Act of 1964, the Age Discrimination in Employment Act of 1967, the Americans with Disabilities Act of 1990, the Arizona Civil Rights Act, Arizona Executive Order 2009-09, and the Human Relations provisions of the Tucson Code.
25. **PROGRAM PARTICIPANT RIGHTS, SAFEGUARDING PARTICIPANT INFORMATION:**
- 25.1. **Grievances.** Agency will establish a system through which applicants for and recipients of Services (“**Participants**”) may present grievances about the Services or the project of which the Services are a part. Agency will advise recipients of this right. Agency will provide to City, within 30 days following the filing of such a grievance, a copy of the grievance and an explanation of how the Agency responded to it.
- 25.2. **Participant Information.** Agency will not use any information concerning a Participant that is obtained by Agency in the performance of its obligations under this Agreement for any purpose other than carrying out this Agreement. Agency will not release any such information to any person or entity other than City without City’s express written consent. Agency will forward all requests for such information to City for appropriate action. Agency will return all such information to City at the expiration of this Agreement.

**CITY OF TUCSON HOUSING AND COMMUNITY DEVELOPMENT DEPARTMENT  
CHOICE NEIGHBORHOODS IMPLEMENTATION GRANT**

**EXHIBIT A – SCOPE OF SERVICES**

**City Contract Number:** 19567

**Agency Name:** Pima County Health Department (PCHD)

**Project Name:** Choice Neighborhoods People Plan

The project shall provide Choice Neighborhoods Implementation (CNI) Grant eligible services as described in the project application and excerpted in the scope of services that follows. All CNI-funded programs are required to comply with CNI program regulations and requirements.

**PROJECT SUMMARY (FEDERAL AWARD PROJECT DESCRIPTION)**

The Pima County Health Department (PCHD) is working to address the unmet needs and barriers to health care and mental health services that contribute to poor health outcomes and negatively impact quality of life for folks residing at Tucson House and in the surrounding community. PCHD was selected as the lead partner on the People-Health component of the City of Tucson’s Choice Neighborhood Implementation grant for the Thrive in the ‘05 Zone, which has enormous potential to improve a system of care and lift the quality of life for people at Tucson House and the surrounding communities who face significant barriers and multiple vulnerabilities. It will also provide an opportunity for PCHD and City of Tucson partners to develop a model for delivering place based integrated health and wellbeing services, that can be replicated to improve access to care and health outcomes in other parts of the City and County. This partnership between the City of Tucson’s Housing and Community Development department and PCHD will result in Tucson House residents having:

1. Increased access to care, health insurance coverage and uptake of routine primary care and mental health services, and
2. Improved health, safety, mental health and wellbeing outcomes for residents and community members over the period of performance.

This opportunity will allow PCHD to focus on the identification and alleviation of persistent and historical health disparities within this target community and surrounding neighborhoods by addressing:

- Non-communicable diseases
- Mental and behavioral health
- Access to care including healthcare screening
- Health literacy
- Appropriate utilization of resources

**POPULATION(S) TO BE SERVED**

The population to be served is Tucson House residents with demographic details listed below:

<b>Total Number of Residents</b>	355	
----------------------------------	-----	--

<b>Total Number of Households</b>	314	
<b>Gender</b>	<b>Number of Residents</b>	<b>Percentage</b>
Female	181	50.7%
Male	176	49.3%
<b>Age</b>	<b>Number of Residents</b>	<b>Percentage</b>
0-5	1	0.3%
6-18	12	3.4%
19-64	202	56.6%
65+	142	39.8%
Disabled	262	73.8%
Work-Able Residents	61	17.2%
<b>Race and Ethnicity</b>	<b>Heads of Households</b>	<b>Percentage</b>
White (non-Hispanic)	162	51.6%
Hispanic/Latino (any race)	94	29.9%
Black	43	13.7%
American Indian	16	5.1%
Asian	6	1.9%

#### **SCOPE OF WORK AND DELIVERABLES**

PCHD will establish a full-time presence at Tucson House by staffing a full time **Health and Wellbeing Coordinator**. The Health and Wellness Coordinator will report to PCHD, but support the City of Tucson's HCD Resident Services Manager in coordinating on-site health services and engaging new partners to fill gaps. The Health and Wellbeing Coordinator will:

- Coordinate across the care team to implement health strategies, screenings, and activities
- Convene residents and community providers and partners to plan and address key health and wellbeing priorities
- Develop a monthly schedule of onsite health education and health promotion events
- Provide training for the care team and community residents
- Support community engagement for the updated comprehensive community health improvement plan (CHIP) and development of the Health Impact Assessment (HIA).

To support the work of the Health and Wellbeing Coordinator, PCHD will leverage the following new services to expand onsite health information and resources:

- Health promotion activities
- Linkages to care and health resources
- Multi-disciplinary approaches centered around Community Health Workers specifically for Tucson House

PCHD and the City of Tucson's HCD Resident Services Manager will collaborate on a set of on-site physical health services that complement one another and increase accessibility of services. These will include a combination of:

1. On-site health screenings/vaccinations/clinics
2. Peer engagement through community health workers
3. Service coordination and navigation.

**IN-KIND Health and Wellbeing Program Oversight and Support:** A PCHD Division Manager from Clinical Services and Community Outreach Prevention Education Divisions (.05 FTE each), will provide **in-kind support** to the Health & Wellbeing Coordinator and oversee expanded non-communicable disease mobile services and offer expanded outreach and health promotion programming. This includes printed materials for health education classes, posters, including curricula and workbooks, flyers and interpreter/translation for non-English speaking residents who require translation or assistive communications.

- PCHD will leverage in-kind personnel support. The Clinical Services Division Manager (.05 FTE) and Community Outreach Prevention Education (COPE) Division Manager (.10 FTE), will each provide administrative oversight of clinical non-communicable diseases mobile services and expanded outreach and health promotion programming.
  - Clinical Services Manager (.05 FTE): \$3,526 annually for 6 years (2.5% annual increase) = \$22,517 total
  - Community Outreach Prevention & Education Manager (.05 FTE): \$3,300 annually for 6 years (2.5% annual increase) = \$21,080 total
- PCHD will provide in-kind printed materials for health education and health promotion, staff and resident training as well as language services required for direct outreach services, communications and health education materials.
  - Printed materials valued at \$1,000 annually for 5 years and \$500 for final year = \$5,500 total
- Translation/Interpretation support valued at \$2,000 annually for 5 years and \$1,000 for final year = \$11,000
- PCHD will provide additional Community Health Worker support to conduct key activities onsite as needed, funded through other grant sources.
- Other programmatic support will include expansion of existing health promotion and health education and training activities on-site at Tucson House to be delivered by the Tobacco and Chronic Disease Prevention and Community Mental Health and Addiction Program. These classes will be offered to up to 20 participants on a bi-monthly basis and will be dedicated to target residents.

Total Program PCHD IN-KIND Oversight and Support Commitment: \$60,096.

**IN KIND Vaccine and Testing Equity Services:** PCHD will deliver vaccine equity and testing equity services, onsite, to address COVID-19 disparities, vaccination uptake and barriers to services for people with underlying health conditions, which can put them at higher risk for severe COVID-19 impacts. Staff effort will center around Community Health Worker outreach, as well as public health nursing and health navigation support for a minimum of 8 hours per month.

- On-site equity services equipment and staff (1 Public Health Nurse, 2 Community Health Workers, and One Navigator) valued at \$1,341 per 8 hour/day once a month for 6 years (estimated 2.5% annual cost increase) = \$102,803

Total Vaccine and Testing Equity Services Commitment: \$102,803

**IN KIND Community Mental Health and Addiction (CMHA)** PCHD will provide integrated programs at Tucson House twice a month for 4 hours to address psychological trauma, grief and loss, substance

misuse, and social isolation and work with residents to access mental health-related services. This includes providing training on trauma informed care to City Case Management staff as well as provider partners and resident/community champions.

- On-site program staff (1 CMHA Outreach Specialist @ 8 hrs/month and 1 Community Health Worker @ 8 hrs/month) valued at \$603 per 4 hour/day twice a month for 6 years (estimated 2.5% annual cost increase) = \$46,194

**IN KIND Health Literacy:** Increasing access to culturally, linguistically appropriate health resources and educational tools to increase understanding of residents. Pima County Communications Department staff will dedicate 8 hours/month to create new materials for use and distribution directly in support of Health and Wellbeing programming at Tucson House. Pima County Communications staff @ 8 hours/month (estimated 2.5% annual cost increase) for 6 years = \$26,254

**IN KIND Human Centered Design:** PCHD will leverage a CDC Strengthening public health infrastructure grant to conduct health service human centered design in the community setting. This would support the co-design of new primary and public health services and programs with Tucson House residents and continue through the establishment of services. Program Manager @ 200 hours in grant year 2 = \$8,919

**IN KIND Health Impact Assessment and Data Support:** Conduct a Health Impact Assessment and inform the creation of CHIP metrics, tracking and report development.

- Program Manager (.2 FTE): \$20,581 annually for 1.5 years = \$30,872
- Social Epidemiologist (.2 FTE): \$22,968 annually for 1.5 years = \$34,452

Total HIA and Data Support: \$65,324

***The total value of these in-kind leveraged funds for new services over eight years is \$309,590***

## **STAKEHOLDER INVOLVEMENT**

City of Tucson Housing and Community Development (HCD) staff leading the Choice Neighborhood Implementation grant are listed below-

- Nick Taras, Resident Services Manager
- Denise Lopez, Resident Services Supervisor
- Annalisa Castro, Resident Services Supervisor
- La'Asia Cain, Resident Services Coordinator (x4)
- Gina Valencia, Resident Services Coordinator
- Deidre Chandler, Resident Services Coordinator
- Julie Elvick, Resident Services Coordinator
- Resident Peer Support Specialist (x4)

The Pima County Health Department will work with other People Conveners:

- Pima County Community and Workforce Development Department

- United Way of Tucson and Southern Arizona

Other community partners who will be engaged in this work include but are not limited to:

- Sun Tran
- Pima Council on Aging
- Community Food Bank of Southern Arizona
- City of Tucson Parks & Recreation
- University of Arizona Garden Kitchen
- Community Gardens of Tucson

## PERFORMANCE MONITORING

Impact Statement: Children, youth, and adults have increased access to healthcare and improved physical and mental health outcomes. Individuals feel a sense of well-being and belonging in their community.

### Goals and Expected Outcomes

8-Year Outcomes:

1. 95% of residents have a place of healthcare they regularly go, other than an emergency room, when they are sick or need advice about their health.
2. 100% of residents have health insurance
3. 60% of residents report health as excellent or good.

### Needs Assessment Baseline

2023 – Source: Annual Needs Assessment Survey

1. 87% of residents have a place of healthcare where they regularly go, other than an emergency room, when they are sick or need advice about their health.
2. 96% of residents have health insurance
3. 40% of residents report health as excellent or good.

## ENVIRONMENTAL REVIEW REQUIREMENTS

The Agency must obtain an environmental review from the City of Tucson Environmental Project Coordinator, Rolanda Mazeika, before beginning any activities associated with the project. The Community Development Division initiates the environmental review on behalf of the Agency, but it is the Agency's responsibility to ensure that the environmental review is complete and received by the Agency before expending any funds or carrying out any activities through this Agreement. The Environmental Review shall include the following activities which are funded within the project:

- Project Based Rental Assistance
- Tenant Based Rental Assistance
- Supportive Services
- Operating Costs (maintenance, security, utilities, furnishings, equipment, supplies, training, etc.)
- Administrative and/or planning costs
- Economic Development Activities
- Homebuyer assistance activities (closing/down payment assistance, buydowns, etc.)
- Affordable housing pre-development costs
- Acquisition or disposition/demolition of existing structures\*
- Acquisition or disposition of land\*
- Rehabilitation of physical/real property\*
- Construction of new physical/real property\*

*\*These activities trigger a more intensive environmental assessment and may delay project implementation.*

**CITY OF TUCSON HOUSING AND COMMUNITY DEVELOPMENT DEPARTMENT  
CHOICE NEIGHBORHOODS IMPLEMENTATION GRANT**

**EXHIBIT B - PERFORMANCE REPORT**

**City Contract Number:** 19657  
**Agency Name:** Pima County Health Department  
**Project Name:** Choice Neighborhoods – Supportive Services

**REPORTING PERIOD**  
 This report is submitted for the quarter ending:

<input type="checkbox"/> <del>December 31, 2025</del>	<input type="checkbox"/> April 30, 2026	<input type="checkbox"/> April 30, 2027	<input type="checkbox"/> April 30, 2028
	<input type="checkbox"/> June 30, 2026	<input type="checkbox"/> June 30, 2027	<input type="checkbox"/> June 30, 2028
	<input type="checkbox"/> October 31, 2026	<input type="checkbox"/> October 31, 2027	<input type="checkbox"/> October 31, 2028
	<input type="checkbox"/> December 31, 2026	<input type="checkbox"/> December 31, 2027	

**PROGRAM NARRATIVE**

Enter a brief description of activities conducted this quarter.

**PERFORMANCE OUTPUTS AND OUTCOMES**

Provide a quantitative update on performance outputs and outcomes defined in Exhibit A – Scope of Work.

OUTPUT/OUTCOME INDICATOR	QUARTER	CUMULATIVE
Number of residents and community provider/ partner meetings convened to plan and address key health and wellbeing.		
Number of onsite health education and health promotion events implemented/ carried out.		
Number of meetings to support community engagement for the updated comprehensive community health improvement plan (CHIP) and development of the Health Impact Assessment (HIA).		
Number of training events for community residents.		
Number of direct health services provided. Examples- screenings, vaccinations, etc.		

**LEVERAGE COMMITMENTS**

Commitment Description	Commitment Value	Total \$ This Quarter	Total \$ to Date

Health and Wellbeing Program, Vaccine and Testing Equity services, Community Mental Health and Addiction services, Health Literacy communications, Human Centered Design consulting, Health Impact Assessment and Data Support	\$309,590		
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**CHALLENGES/DELAYS**

Describe any challenges or delays that have occurred in project delivery and strategy to resolve.

**CERTIFICATION**

I certify that I am authorized to submit this report on behalf of the Agency and that all information contained in this report and the accompanying participant roster is accurate and supported by documentation maintained at my Agency. I understand that such documentation may be inspected by the City and/or the U.S. Department of Housing and Urban Development and that all records of these services shall be maintained and available for inspection until January 1, 2035.

\_\_\_\_\_  
Name/Title of Authorized Representative

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date



**CITY OF TUCSON HOUSING AND COMMUNITY DEVELOPMENT DEPARTMENT  
CHOICE NEIGHBORHOODS IMPLEMENTATION GRANT**

**EXHIBIT C – PROJECT BUDGET**

City Contract Number: 19657

Agency Name: Pima County Health Department

Project Name: Choice Neighborhoods – Supportive Services

**2 CFR 200 FEDERAL FUNDS BUDGET INFORMATION**

<b>A. Total Federal Funds Previously Obligated</b>	\$0
<b>B. Federal Funds Committed Under This Obligation</b>	\$202,734
<b>C. Total Federal Funds Obligated to Date (A+B)</b>	\$202,734

Subaward funds include federal funds awarded by the U.S. Department of Housing and Urban Development. Agency Leverage Funds include those funds firmly committed by the Agency using non-HUD/non-City resources. Financial tracking and reporting on the expenditure of such funds toward the Agency's leverage commitment is required as part of the project and in order to ensure continued receipt of Federal funds.

**PROJECT BUDGET**

<b>Budget Categories (enter applicable dollar figures):</b>		<b>Federal Funds (HUD)</b>
1.	Personnel Wages	\$147,981
2.	Personnel Fringe Benefits	\$54,753
3.	Supplies	
4.	Equipment	
5.	Travel Expense (mileage, vehicle expense)	
6.	Other: (describe)	
7.	Other: (describe)	
8.	Other: (describe)	
<b>TOTAL</b> (Federal funds line items must total subaward amount):		<b>\$202,734</b>

**BUDGET MODIFICATIONS**

All requests for budget modifications must be submitted in writing and approved by the Housing and Community Development Department. Budget modifications which change the total amount of funds obligated to this subaward may only occur through formal amendment to this agreement. Budget modifications which move funds between approved budget line items without affecting the overall amount of federal funds obligated to this subaward may be approved as mutually agreed by both parties without formal amendment to this agreement.

**BUDGET NARRATIVE**

*Provide a detailed narrative of the activities and costs to be included in each budget line above. Include sufficient detail regarding quantity, cost, and calculation methodologies to demonstrate that all costs are reasonable, prudent, and necessary to carry out the scope of work outlined in Exhibit A.*

This budget narrative presents each federal budget category for which there are costs, explaining each line item, cost basis, and calculation. All costs are based on prior experience delivering similarly scoped projects and cost pricing research. All costs are based on direct expenses unless specifically designated otherwise. The Pima County Health Department (PCHD) requests \$67,578 for Year 1, and \$202,734 for the three-year period of performance.

**Personnel**

PCHD Personnel expenses are estimated based on time allocation estimates for one position and current salary figures for these job classifications. The position is identified at the appropriate classification level as defined by Pima County Human Resources. Compensation is generated through the comparison of the mandatory salary level for new positions and the existing salary for current employees to ensure equity. Individual salary totals are calculated by multiplying annual salary by the FTE% by the years in the period of performance. Personnel Total is the sum of each individual position total.

Salaries and Wages	Salary	FTE	Years	Non Federal Total
Name and/or Title				
Program Coordinator	\$67,857	.72693	3	\$147,981
<b>SALARIES AND WAGES TOTAL</b>				<b>\$147,981</b>

**Position Descriptions**

Program Coordinator: This position will coordinate and manage day to day activities, including: coordinate care and grant services for City-referred clients, convene community health events, develop health event schedule, provide training, and support community engagement. The Program Coordinator will report to Dr. Andrew Saal, Assistant Medical Director.

**Fringe Benefits**

The Fringe Benefit Total is calculated by multiplying the personnel total for each position by each individual personnel's fringe benefit election percentage, then adding each individual fringe benefits total. A standard fringe benefit percentage of 37% is applied to to-be-hired positions.

Fringe Benefits	Personnel Total	Fringe Benefit %	Years	Non Federal Total
Program Coordinator	\$147,981	.37	3	\$54,753
<b>FRINGE BENEFITS TOTAL</b>				<b>\$54,753</b>

**Grant Total**

The Grant Total is calculated by adding the totals from each individual category. Indirect costs are not applied to this program budget.

<b>Federal Cost Category</b>	<b>Federal Total</b>
Personnel Total	\$147,981
Fringe Benefits Total	\$54,753
<b>Grant Total</b>	<b>\$202,734</b>

Send original signed request, General Ledger, and Backup Documents (canceled checks, receipts, etc. TO: Rachel Briggs: [rachel.briggs@tucsonaz.gov](mailto:rachel.briggs@tucsonaz.gov)

NOTE: IF PAYMENT REQUEST INCLUDES ANY CHARGES FOR PERSONNEL AND/OR MORE THEN COPIES OF TIME WORKED RECORDS ARE TO BE PROVIDED

## EXHIBIT D PAYMENT REQUEST

Contract Number: 19657 Invoice Number: \_\_\_\_\_

Agency Name: Pima County Health Department

Project Name: Choice Neighborhoods – Supportive Services

Period for Reimbursement: \_\_\_\_\_

(MM/DD/YY TO MM/DD/YY)

A. Total Award Amount		\$
B. Prior Expenditures		\$
C. Total Amount Requested for this Payment		\$
D. Total Expenditures Plus New Costs Incurred (B plus C)		\$
E. Balance After Requests (A minus D)		\$

	Budget Categories	Budget	Expended This Quarter	Expended To Date
1.	Personnel Wages			
2.	Personnel Fringe Benefits			
3.	Supplies			
4.	Equipment			
5.	Travel Expense (mileage, vehicle expense)			
6.	Other: (describe)			
7.	Other: (describe)			
8.	Other: (describe)			
<b>TOTAL</b>				

<b>Prepared by:</b>		
	Name	Phone:

**FOR CITY OF TUCSON USE ONLY:**

<b>ACCOUNT #</b>	<b>AMOUNT APPROVED FOR PAYMENT</b>
	\$

**CITY OF TUCSON HOUSING AND COMMUNITY DEVELOPMENT DEPARTMENT  
CHOICE NEIGHBORHOODS IMPLEMENTATION GRANT**

**EXHIBIT E – AGREEMENT CONTACTS**

City Contract Number: 19657

Agency Name: Pima County Health Department

Project Name: Choice Neighborhoods – Supportive Services

<b>Primary Contact for Subaward Notices, Legal Action, Authorized Organizational Representative</b>		
	<b><i>City of Tucson</i></b>	<b><i>Pima County</i></b>
Name	Ann Chaneka	Dorothee Harmon
Title	Director	Division Manager
Telephone	520-837-6691	520-724-6076
Email	Ann.chaneka@tucsonaz.gov	Dorothee.harmon@pima.gov
Mailing Address	310 S. Commerce Park Loop	97 E. Congress

<b>Financial Contact for Budget, Invoicing, and Reimbursement Issues</b>		
	<b><i>City of Tucson</i></b>	<b><i>Pima County</i></b>
Name	Rachel Briggs	Pam Bottolfson
Title	Grant Coordinator	Division Manager
Telephone	520-850-3953	520.724.7711
Email	Rachel.briggs@tucsonaz.gov	Pamela.bottolfson@pima.gov
Mailing Address	310 S. Commerce Park Loop	97 E. Congress

<b>Programmatic Contact for Operational and Implementation Issues</b>		
	<b><i>City of Tucson</i></b>	<b><i>Pima County</i></b>
Name	Grae Pollard	Brittany Nigon
Title	Resident Services Manager	Program Manager 1
Telephone	520-965-1932	520-724-7623
Email	Grae.Pollard@tucsonaz.gov	Brittany.nigon@pima.gov
Mailing Address	1475 N. Oracle Rd	3950 S. Country Club Rd, Suite 100 Tucson AZ 85714

**EXHIBIT G:**  
**Certification for**  
**a Drug-Free Workplace**

U.S. Department of Housing  
and Urban Development

Applicant Name

Pima County Health Department

Program/Activity Receiving Federal Grant Funding

Choice Neighborhoods - Supportive Services

Acting on behalf of the above named Applicant as its Authorized Official, I make the following certifications and agreements to the Department of Housing and Urban Development (HUD) regarding the sites listed below:

I certify that the above named Applicant will or will continue to provide a drug-free workplace by:

a. Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the Applicant's workplace and specifying the actions that will be taken against employees for violation of such prohibition.

b. Establishing an on-going drug-free awareness program to inform employees ---

(1) The dangers of drug abuse in the workplace;

(2) The Applicant's policy of maintaining a drug-free workplace;

(3) Any available drug counseling, rehabilitation, and employee assistance programs; and

(4) The penalties that may be imposed upon employees for drug abuse violations occurring in the workplace.

c. Making it a requirement that each employee to be engaged in the performance of the grant be given a copy of the statement required by paragraph a.;

d. Notifying the employee in the statement required by paragraph a. that, as a condition of employment under the grant, the employee will ---

(1) Abide by the terms of the statement; and

(2) Notify the employer in writing of his or her conviction for a violation of a criminal drug statute occurring in the workplace no later than five calendar days after such conviction;

e. Notifying the agency in writing, within ten calendar days after receiving notice under subparagraph d.(2) from an employee or otherwise receiving actual notice of such conviction. Employers of convicted employees must provide notice, including position title, to every grant officer or other designee on whose grant activity the convicted employee was working, unless the Federal agency has designated a central point for the receipt of such notices. Notice shall include the identification number(s) of each affected grant;

f. Taking one of the following actions, within 30 calendar days of receiving notice under subparagraph d.(2), with respect to any employee who is so convicted ---

(1) Taking appropriate personnel action against such an employee, up to and including termination, consistent with the requirements of the Rehabilitation Act of 1973, as amended; or

(2) Requiring such employee to participate satisfactorily in a drug abuse assistance or rehabilitation program approved for such purposes by a Federal, State, or local health, law enforcement, or other appropriate agency;

g. Making a good faith effort to continue to maintain a drug-free workplace through implementation of paragraphs a. thru f.

2. **Sites for Work Performance.** The Applicant shall list (on separate pages) the site(s) for the performance of work done in connection with the HUD funding of the program/activity shown above: Place of Performance shall include the street address, city, county, State, and zip code. Identify each sheet with the Applicant name and address and the program/activity receiving grant funding.)

1501 N Oracle Road, Tucson, AZ 85705

Check here  if there are workplaces on file that are not identified on the attached sheets.

I hereby certify that all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate.

**Warning:** HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties.  
(18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802)

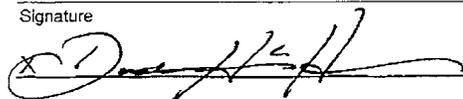
Name of Authorized Official

Dorothee Harmon

Title

Division Manager- Authorized Organization Representative

Signature



Date

7/16/2025

CERTIFICATION REGARDING LOBBYING

Certification for Contracts, Grants, Loans, and Cooperative Agreements

The undersigned certifies, to the best of his or her knowledge and belief, that:

(1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

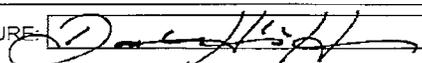
(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure of Lobbying Activities," in accordance with its instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly. This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Statement for Loan Guarantees and Loan Insurance

The undersigned states, to the best of his or her knowledge and belief, that:

If any funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this commitment providing for the United States to insure or guarantee a loan, the undersigned shall complete and submit Standard Form-LLL, "Disclosure of Lobbying Activities," in accordance with its instructions. Submission of this statement is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required statement shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

* APPLICANT'S ORGANIZATION	
Pima County Health Department	
* PRINTED NAME AND TITLE OF AUTHORIZED REPRESENTATIVE	
Prefix: <input type="text"/>	* First Name: <input type="text" value="Dorothee"/> Middle Name: <input type="text"/>
* Last Name: <input type="text" value="Harmon"/>	Suffix: <input type="text"/>
* Title: <input type="text" value="Division Manager- AOR"/>	
* SIGNATURE: 	* DATE: <input type="text" value="7/16/2025"/>

# EXHIBIT I - SUBRECIPIENT VS. CONTRACTOR DETERMINATION

This document is intended to help a recipient of federal funds make a judgment as to whether each agreement it makes, for the disbursement of federal program funds, casts the entity receiving the funds in the role of a subrecipient or a contractor. Based on 2 CFR Chapter I, Chapter II, Part 200 et al. Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance), issued by the U.S. Office of Management and Budget (OMB) on December 26, 2013, and effective for non-federal entities on December 26, 2014, the following information is intended for use by all non-federal entities.

## Important Terms:

**Recipient:** A non-federal entity that receives a federal award directly from a federal awarding agency to carry out an activity under a federal program. The term recipient does not include subrecipients. (See 2 CFR 200.86 of the Uniform Guidance.)

**Subrecipient:** A non-federal entity that receives a subaward for the purpose of carrying out part of a federal award. The subaward creates a federal assistance relationship with the subrecipient. (See 2 CFR 200.93 & .330 (a) of the Uniform Guidance.)

**Contractor:** A non-federal entity that receives a contract for the purpose of providing goods and services for the awarding non-federal entity's own use. The contract creates a procurement relationship with the contractor. The Uniform Guidance replaced the term "Vendor" with "Contractor." (See 2 CFR 200.22 & .330 (b) of the Uniform Guidance.)

**Instructions:** The "Characteristics" column in this checklist is based on language in the Uniform Guidance. The column lists characteristics that support the classification of a non-federal entity as a subrecipient or contractor. Since all of the characteristics listed may not be present in all cases, the Uniform Guidance recognizes that the recipient "...must use judgment in classifying each agreement as a subaward or a procurement contract." (2 CFR 200.330 (c).) In the "Explanations" column, AGA provides additional information to assist in answering the questions under "Characteristics." Answer each question by checking "yes" or "no" where indicated. Based on responses to the questions, a key provided at the end of each section will help in making a judgment as to whether a subrecipient or contractor relationship exists. White space is provided in between the "Characteristics" column and the "Explanation" column so that users can tailor this checklist to accommodate the unique aspects of various programs or jurisdictions.

**Note:** One check in a subrecipient box does not necessarily mean the entity is a subrecipient. A judgment should be based on the totality of responses.

Office City of Tucson HCD  
Entity receiving funds Pima County Health Department  
Funding Source(s) FY2022 Choice Neighborhoods Implementation Grant

## Notes:

Subrecipient determination for City contract #19657.



## CHARACTERISTICS

## EXPLANATIONS

### Decision Making Authority

**200.330 a. 1** Determines who is eligible to receive what Federal assistance;

a. Does the entity determine who is eligible to participate in the federal program?

Yes	No
<input type="checkbox"/>	<input checked="" type="checkbox"/>

**200.330 a.3** Has responsibility for programmatic decision making;

a. Does the entity have the ability to make decisions about how services will be delivered to participants, in accordance with federal programmatic requirements?

Yes	No
<input checked="" type="checkbox"/>	<input type="checkbox"/>

**OR**

**200.330 b.4** Provides goods or services that are ancillary to the operation of the Federal program;

b. Does the entity provide goods or services for the recipient's own use?

Yes	No
<input type="checkbox"/>	<input checked="" type="checkbox"/>

b. Does the entity provide services designated by the recipient to serve the recipient's participants without regard to specific federal programmatic requirements?

Yes	No
<input type="checkbox"/>	<input checked="" type="checkbox"/>

If you selected "yes" to **EITHER** item **a**, this is an indicator of a subrecipient relationship.  
If you selected "yes" to **EITHER** item **b**, this is an indicator of a contractor relationship.

Subrecipient	Contractor
<input checked="" type="checkbox"/>	<input type="checkbox"/>

If the entity determines whether a participant meets a federal program's eligibility requirements for assistance, it is most likely a subrecipient.

A contractor may provide services to clients in a program after eligibility has been determined by the recipient.

If the entity has authority to make decisions regarding the delivery of service, operations, or types of assistance provided within the terms of the agreement, it is typically a subrecipient.

If the entity provides goods or services directly to the recipient or to program participants at the direction of the recipient and does not make programmatic decisions or adhere to program requirements, it is typically a contractor.

### Nature of Award

## EXPLANATIONS

**200.330 a. 2** Has its performance measured in relation to whether objectives of a federal program were met;

a. Are the scope of work (or portion, if applicable) and terms and conditions of the agreement the same for the entity as they are for the recipient that received the federal funds?

Yes	No
<input checked="" type="checkbox"/>	<input type="checkbox"/>

a. Is the entity carrying out completion of the goal of the grant (or part, if applicable) as stated in the federal award?

Yes	No
<input checked="" type="checkbox"/>	<input type="checkbox"/>

**OR**

**200.330 b.5** Is not subject to compliance requirements of the Federal program as a result of the agreement, though similar requirements may apply for other reasons.

b. Does the recipient develop the scope of work and terms and conditions of the agreement to meet the recipient's needs?

Yes	No
<input type="checkbox"/>	<input checked="" type="checkbox"/>

If you selected "yes" to **EITHER** item **a**, this is an indicator of a subrecipient relationship.  
If you selected "yes" to item **b**, this is an indicator of a contractor relationship.

Subrecipient	Contractor
<input checked="" type="checkbox"/>	<input type="checkbox"/>

If the entity is providing a service for the recipient to meet the goal of the grant, it is a contractor; if the entity is providing a service that carries out a goal within the scope of the grant, it is a subrecipient. When a grant program contains multiple goals, it is possible for the recipient to complete part of the goals and for the entity to perform another part.

If the scope of the agreement is per the federal program terms/guidance, the entity is a subrecipient. A subrecipient may also provide programmatic or progress reports to ensure compliance with federal program requirements.

Conversely, if the scope of the agreement is per the recipient's terms and not federal program guidance, and if the recipient's oversight is governed only by the contract terms and conditions, it is a contractor.

## Award Risk

**200.330 a.4** Is responsible for adherence to applicable Federal program requirements specified in the Federal award;

a. Funding to the entity depends on the entity's ability to best meet the objectives of the award. Although performance is measured against federal award objectives, the entity assumes little risk if the objectives are not met.

Yes	No
<input checked="" type="checkbox"/>	<input type="checkbox"/>

**OR**

**200.330 b.5** Is not subject to compliance requirements of the Federal program as a result of the agreement, though similar requirements may apply for other reasons.

b. The entity assumes financial risk if they fail to deliver the goods or services agreed upon.

Yes	No
<input checked="" type="checkbox"/>	<input type="checkbox"/>

Subrecipient	Contractor
<input checked="" type="checkbox"/>	<input type="checkbox"/>

If you selected "yes" to item **a**, this is an indicator of a subrecipient relationship. If you selected "yes" to item **b**, this is an indicator of a contractor relationship.

## EXPLANATIONS

If the funding is given to the entity with a purpose of completing the goal of the grant, the recipient will be required to ensure the entity adheres to federal grant program guidance. The recipient will also be required to monitor the activities of the entity per Uniform Guidance section 200.331. The entity assumes little risk should federal grant guidance not be met. The risk falls with the recipient.

If the recipient directs specific activities to be completed by the entity, by providing goods or services, the risk falls on the entity to deliver, per the agreement terms. In this case, the entity would not be required to adhere to the federal grant program requirements, just the terms and conditions in the agreement with the recipient.

## Criteria for Selection

**200.330 a.5** In accordance with its agreement, uses the Federal funds to carry out a program for a public purpose specified in authorizing statute, as opposed to providing goods or services for the benefit of the pass-through entity.

a. Does the entity demonstrate a financial or public need for funding to carry out a project or provide a service?

Yes	No
<input checked="" type="checkbox"/>	<input type="checkbox"/>

a. Will the entity be contributing match or other non-Federal funding in support of the award?

Yes	No
<input checked="" type="checkbox"/>	<input type="checkbox"/>

a. Will the entity be reimbursed for only actual costs incurred?

Yes	No
<input checked="" type="checkbox"/>	<input type="checkbox"/>

**OR**

**200.330 b.3** Normally operates in a competitive environment;

b. Were procurement policies applied in the selection of the entity?

Yes	No
<input type="checkbox"/>	<input checked="" type="checkbox"/>

b. Was the entity's proposed price a factor in the selection process?

Yes	No
<input type="checkbox"/>	<input checked="" type="checkbox"/>

b. Will the entity derive a profit from the agreement?

Yes	No
<input type="checkbox"/>	<input checked="" type="checkbox"/>

Subrecipient	Contractor
<input checked="" type="checkbox"/>	<input type="checkbox"/>

If you selected "yes" to **ANY** item **a**, this is an indicator of a subrecipient relationship. If you selected "yes" to **ANY** item **b**, this is an indicator of a contractor relationship.

## EXPLANATIONS

If the entity was chosen because it has the best widgets or service for the price, it has a contractor relationship with the recipient. Typically, a procurement method is followed, such as a competitive bid or RFP process. In this type of agreement, the entity usually makes a profit by delivering this good or service to the recipient. Payments to contractors are typically made based on contract terms.

Conversely, if the entity was chosen because it was already providing a service within the guidelines of the grant program and wants to partner with the recipient to expand the delivery or assist in meeting the goal of the grant, it may be a subrecipient. Typically, the entity may not make a profit and may provide its own non-federal funding as match or cost sharing. The entity may have been chosen through an application process or an announcement of funding, as opposed to the procurement process described above. Payment to a subrecipient is generally based on actual expenses unless awarded on a fixed amount subaward (2 CFR 200.332). It is typical of subrecipients to submit budgets, financial reports, or copies of invoices to the recipient, to document activity.

## Entity's Business Environment

## EXPLANATIONS

**200.330 b.1** Provides the goods and services within normal business operations;

b. Is the entity's normal business to provide the goods or services being purchased in the agreement?

Yes	No
<input type="checkbox"/>	<input checked="" type="checkbox"/>

**200.330 b.2** Provides similar goods or services to many different purchasers;

b. Does the entity provide the same goods or services to other organizations?

Yes	No
<input checked="" type="checkbox"/>	<input type="checkbox"/>

If you selected "no" to **EITHER** item, it is an indicator of a subrecipient relationship. If you selected "yes" to **BOTH** items, it is an indicator of a contractor relationship.

Subrecipient	Contractor
<input checked="" type="checkbox"/>	<input type="checkbox"/>

If a federal program provides funding to modify public buildings for handicapped accessibility and the recipient provides funds to an entity to update the entity's building, per the terms of the award, then a subrecipient relationship exists.

Conversely, if the recipient hires an entity to update their own building to be handicapped accessible, then a contractor relationship exists.

## Determination

## EXPLANATIONS

### Final Determination

Subrecipient	Contractor
<input checked="" type="checkbox"/>	<input type="checkbox"/>

Review all the entries and make an overall determination of the relationship. **Check the appropriate box in this section.**

**Determined by** Nick Taras  
(enter name of person initially making decision)

5/20/25  
(date)

**Approved by** Jason Thorpe  
(enter name of person reviewing)

5/20/25  
(date)

*Based on the relationship determined above, see additional guidance on requirements governing agreements.  
Section 200.331 - "Requirements for pass-through entities," for subrecipient agreements,  
Section 200.317 through 200.326 - "Procurement Standards," for contractor agreements.*

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**CHOICE NEIGHBORHOODS PEOPLE PLAN**

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**CITY OF TUCSON**

**December 20, 2024**

**VERSION 1**

**GRANTEE POC:**

Nick Taras  
[Nick.Taras@tucsonaz.gov](mailto:Nick.Taras@tucsonaz.gov)  
(520) 837-5444

**HUD CHOICE NEIGHBORHOODS PEOPLE SPECIALIST:**

Katie Morton  
katherine.e.morton@hud.gov  
202-402-7608

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**People Plan**  
**Choice Neighborhoods Implementation Grant**

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**FY Grant Award:** FY 2022

**Lead Grantee:** City of Tucson

**Co-Grantee (if any):**

**People Implementation Entity:** City of Tucson, Housing & Community Development, Resident Services Division

**Principal Education Partner:** City of Tucson

**Target Public Housing/Assisted Housing and number of units:** Tucson House, 407 units

**Target Neighborhood:** Thrive in the 05

**Grant Term:** July 26, 2023 to September 30, 2032

**Names and Titles of People Team Members (with percent of time dedicated to grant):**

<b>Name</b>	<b>Title</b>	<b>FTE</b>
Nick Taras	Resident Services Manager	1.0
Denise Lopez	Resident Services Supervisor	1.0
Annalisa Castro	Resident Services Supervisor	1.0
La'Asia Cain	Resident Services Coordinator (x4)	1.0
Gina Valencia	Resident Services Coordinator	1.0
Deidre Chandler	Resident Services Coordinator	1.0
Julie Elvick	Resident Services Coordinator	1.0
<i>Recruiting/Onboarding</i>	Resident Peer Support Specialist (x4)	1.0

**I. Summary of Changes Since Application**

This People Plan is reflective of the Thrive in the 05 neighborhood vision - *a safe, affordable, inclusive neighborhood that cultivates sustainable transformation through resiliency, reinvestment, and shared leadership; a community that honors our unique history and cultural identity, where multiple generations share the means to THRIVE* – and is designed to meet the unique needs of Tucson House residents.

In fall 2023, the City of Tucson (City) Housing and Community Development (HCD) department contracted with a University of Arizona (UA) based research team to complete a new Resident Assets and Needs Assessment to inform changes needed to the People Plan included with the grant application. There were two parts to the assessment work:

- First, the UA team, with City and resident support, administered an in-depth survey to Tucson House residents between November and December 2023. Open to all Tucson House households, participants were given a \$25 gift card as a “thank you” for their time. Surveys were administered in-person by HCD and UA staff with residents at Tucson House during open drop-in hours.

Survey Resident Ambassadors were hired to advise on survey design, test the survey instrument, and assist with outreach, set-up, and managing waiting residents on survey days. To ensure all residents could participate, the survey was translated into Spanish, and the City provided Arabic and Vietnamese interpreters to help administer the survey to households that spoke these languages. In total, 269 out of 366 original Tucson House households completed the survey for a response rate of 73%. The UA team also administered a special “family survey” module to 10 of the 13 (77%) households with children living on site.

- Second, the UA team conducted 6 focus groups in January 2024 to dig-deeper into key topics identified by the survey results. In total, 25 residents participated in one or more focus groups.

The UA team used the findings from the survey and focus groups to identify major service gaps and opportunities to enhance services already provided on-site that were used to inform the updated People Plan.

High-level takeaways from the Resident Assets and Needs Assessment include the following:

- **Improvements to Existing Services:** Residents are generally satisfied with existing services at Tucson House; however, they felt more staff was needed to deliver resident support services and felt that communications about available services could be improved.
- **Access to Wraparound and Supplemental Health Services:** 96% of residents responding to the survey have health insurance and 85% have a primary care physician. However, between 20% to 50% of respondents reported not receiving adequate health supports in the following areas: vision care, hearing care, transportation to health care services, and other vital supplemental and wraparound health services.
- **Interest in Part-Time Employment:** With 75% of Tucson House residents retired or not working due to a disability/ poor health, there is strong interest in flexible, part-time employment as opposed to full-time employment. Specifically, 28% of residents expressed an interest in part-time work and 17% in temporary work.
- **Focus on Life Enrichment Education:** Most residents are not interested in traditional educational programs like GED or higher education programs. Rather, residents are interested in non-degree educational programming focused on life enrichment and life skills, such as technology training.
- **Transportation to Non-Bus Route Destinations:** About one-third of residents have unmet transportation needs and 24% reported that transportation to access health care was a challenge. Focus group participants highlighted the difficulties residents have in accessing destinations not on existing bus routes.
- **Ongoing Safety Concerns Inside and Outside of Tucson House:** Of the residents responding to the survey, 40% reported feeling unsafe inside Tucson House and 50% felt unsafe in the building’s outdoor spaces due to increased drug activity and unsheltered homelessness throughout the neighborhood. Existing safety protocols are seen as inadequate and there is high demand for enhanced security services.
- **Need for Recreational Activities:** Focus groups participants expressed a desire for more onsite recreational programming and more dedicated recreation spaces because existing spaces are frequently repurposed for service delivery.
- **Better Communication:** Among residents responding to the survey, 20% were unaware of the services available at Tucson House, 12% did not know how to access services, and 10% were uncertain about where to go for services. Current one-on-one communication with staff and service providers is experienced by some residents as being rushed and impersonal.

- Training on Resident Conflicts & Emergency Situations: Residents want more services to address conflict resolution between neighbors, and information about what to do when their neighbors are having a disruptive mental health episode.
- Addressing Youth Needs: Families with children reported an unmet need for age-appropriate recreational activities and educational services (e.g., tutoring).

These key findings point to four areas for investment that are a part of the People Plan for Tucson House:

- Increasing the number of on-site resident support staff.
- Improving communication from management staff and services providers to residents.
- Addressing access barriers to supplemental and wraparound health care services.
- Expanding the availability of appropriate education and employment programming tailored to the interests and needs of current residents.

Since grant award, HCD has focused on building and sustaining its existing Resident Services team and on-site partners. Additionally, the Resident Services team has begun to coordinate with the CNI Grant Administration Team and Housing teams to support residents in beginning to understand relocation, facilitate communication with residents, and support residents at risk of eviction. HCD has encountered setbacks in building its full Resident Services team, including two failed recruitments for a Resident Services Manager to lead the People work. As of the date of the submission of this plan, an offer has been made and accepted by a candidate for the Resident Services Manager position, and interviews for Care Coordinators (case managers) are underway. Peer Support Navigators will be recruited next to complete HCD's Resident Services team. Two Resident Services Supervisors started in February 2024. Since then, they have held meet and greets with residents and developed protocols for receiving referrals for case management from Property Management.

The Equitable Economic Mobility Initiative (EEMI) pilot program ended in June 2024, with many of the initiatives, partners, and connections to workforce training and financial empowerment transitioning to the Resident Services team and the new on-site half-time Workforce Development Specialist through the Pima County Department of Community and Workforce Development (CWD).

People Convener partners (Pima County Health Department, Pima County Community and Workforce Development, and United Way) were engaged in more depth to support both the Needs Assessment and People Plan, developing an understanding of the full landscape of services planned for Tucson House residents and cross-pollination of strategies across goal areas.

The goals, funding allocations, and resources commitments for the People Plan remain largely similar to the grant application. Changes include:

- New partners and programs have been identified over the past year to supplement those included in the application. The value of these resources will be codified in formal MOUs in the coming months.
- New programs to be funded using the City's General Fund leveraged commitment are beginning to be outlined to best meet the unique needs of Tucson House residents.
- One of the new Resident Services Supervisors is trained and experienced in the peer support model which will help facilitate the proposed approach to case management.

Demographics Overview

As of November 2024

<b>Total Number of Residents</b>	355	
<b>Total Number of Households</b>	314	
<b>Gender</b>	<b>Number of Residents</b>	<b>Percentage</b>
Female	181	50.7%
Male	176	49.3%
<b>Age</b>	<b>Number of Residents</b>	<b>Percentage</b>
0 to 5	1	0.3%
6 to 18	12	3.4%
19 to 64	202	56.6%
65+	142	39.8%
<b>Disabled</b>	262	73.8%
<b>Work-Able Residents</b>	61	17.2%
<b>Race and Ethnicity</b>	<b>Heads of Households</b>	<b>Percentage</b>
White (non-Hispanic)	162	51.6%
Hispanic/Latino (any race)	94	29.9%
Black	43	13.7%
American Indian	16	5.1%
Asian	6	1.9%

**II. Strategies and Expected Outcomes**

**Table 1: Income and Employment Strategy and Expected Results by Final Year of the Grant**

**Impact Statement:** Residents build economic mobility: 1) Create economic stability (ability to meet basic needs), 2) Develop economic security (stable employment and ability to cover expenses), and 3) Build ability to save for self and family’s future.

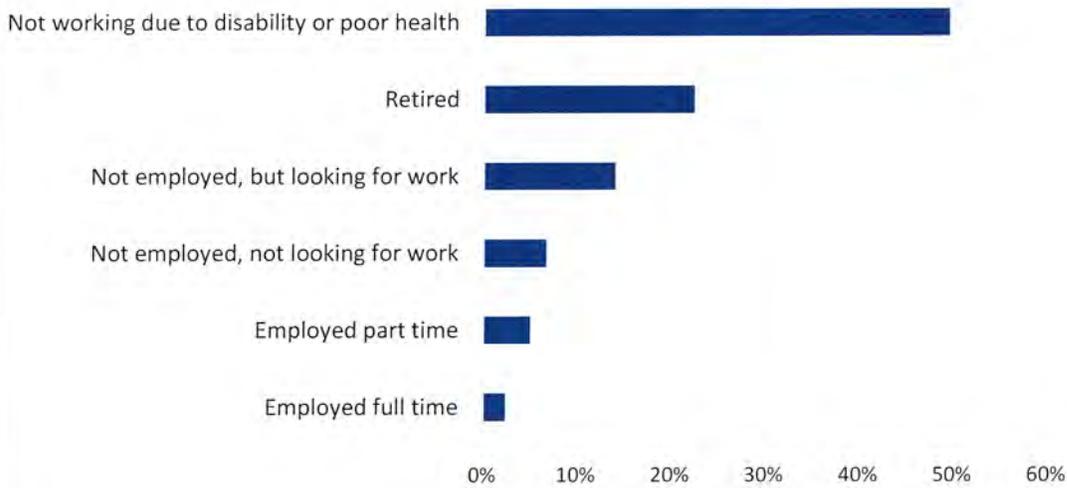
<b>Goals and Expected Outcomes</b>	<b>Needs Assessment Baseline</b>
<p><i>8-Year Outcomes:</i></p> <ol style="list-style-type: none"> <li>1. 25% of residents 18-64 have wage income</li> <li>2. Average annual income of non-disabled households 18-64 increases to \$15,000</li> <li>3. Average annual income of ALL households increases to \$18,000</li> <li>4. 100% of households will have income (wage or benefits)</li> </ol>	<p><i>2023 – (S)=Annual Needs Assessment Survey, (A) = Administrative Data at year end</i></p> <ol style="list-style-type: none"> <li>1. 11% (25/231) of residents 18-64 have wage income (A)</li> <li>2. \$3,670 - average annual income of non-disabled households 18-64. N=57 (A)</li> <li>3. \$11,157 - average annual income of ALL households</li> <li>4. 82% (303/369) of households have income (wage or benefits)</li> </ol>

**Strategies**

The majority of Tucson House residents face multiple and overlapping barriers to work such as age, disability and health issues including behavioral and substance use, and recent homelessness. According to Administrative Data at the end of 2023, only 27 Tucson House households reported wage income; 25 of whom were working-age adults (18-64 years old). With few residents working, most Tucson House residents rely on modest Social Security and disability payments to purchase necessities. For all Tucson House residents, the average annual income is \$11,157 and, among working-age non-disabled households, the average annual income is substantially lower at \$3,670.

Needs Assessment data provided insight into why most Tucson House residents have little wage income. When asked about employment status (Figure 1), 71% of the adults captured in the resident survey are retired or not working due to a disability or poor health. Among the rest, 14% are unemployed but looking for work, 2% are employed full-time, and 5% are employed part-time. With many residents not looking for work because they are retired or disabled / in poor health, only 11% of all survey respondents were interested in full-time work and 10% in self-employment. However, residents – regardless of age/disability/health status - were interested in flexible, part-time employment. Specifically, 25% of all survey respondents were interested in part-time work and 16% were interested in temporary work.

**Figure 1: Employment status of all Survey Respondent Household Members**



**Note:** Survey respondents were asked to report the employment situation for themselves and for all other household members.

Of the working-age respondents, 11% reported wage income from part-time or full-time employment; 16% were not employed but looking for work; and the remaining 73% reported that they were (a) not employed due to disability or poor health, (b) not employed and not looking for work, or (c) retired. Many working-age survey respondents were interested in increasing their income: about 20% wanted to maintain their full-time employment or find full-time employment; about 30% were interested in temporary or part-time work; and 20% were interested in some other work arrangement (e.g., day labor, self-employment). A focus of the 2024 Needs Assessment Survey will be to understand the needs of this population more specifically, including what kinds of careers they are interested in and what kinds of support is needed.

The Resident Services Manager will be the primary point of contact to coordinate on-site services and partner resources under this strategy. **Pima County’s Department of Community and Workforce Development (CWD)** will be the City’s core partner and together with the Resident Services Manager, will convene a coalition of providers for benefits enrollment, basic education, job training, digital literacy, employability skills, and financial wellness services. CWD administers funding and programs under the **Workforce Innovation and Opportunity Act (WIOA)**, the ARIZONA@WORK One-Stop Job Centers, youth programs, and community assistance programs. The City and County will employ an Equitable Economic Mobility Initiative (EEMI) framework to address economic mobility at Tucson House. The EEMI framework defines economic mobility as a continuum with three steps: 1) economic stability (ability to meet basic needs), 2) economic security (stable employment and ability to cover expenses), and 3) ability to save for self and family’s future.

**Economic Stability**

*Benefits Maximization*

In addition to exploring resident interest in work opportunities, EEMI piloted strategies for stabilizing resident finances and improving financial capacity as a baseline. This starts with ensuring that it is as accessible as possible to maximize benefits. The following new initiatives are planned or underway:

- Resident Services will focus on maximizing a household's enrollment in eligible benefits to move households from emergency need to stabilization using the nationally recognized **SSI/SSDI Outreach, Access, and Recovery (SOAR) model**. SOAR helps individuals experiencing or at risk of homelessness who have a serious mental illness, medical impairment, and/or a co-occurring substance use disorder apply for Social Security disability benefits. CWD will train Resident Services to enroll households in public benefits, set up a monthly budget, and establish payment plans. Each household will also receive assistance in applying for other benefits such as Medicare, Social Security, VA benefits, DES assistance and child support.
- Resident Services will target households that have no reported earned or unearned income to assess them for benefits eligibility.
- The **Department of Economic Security (DES)** will provide on-site enrollment office hours every other month for appointments with residents to process paperwork and sign up for benefits.
- Resident Services and CWD will pursue "site provider" status with DES to process benefits applications in house.

#### *Temporary/Short-Term Income Opportunities*

A lesson learned from the EEMI pilot is that many residents avoid conversations about jobs and traditional workforce development but are very interested in discrete opportunities to earn extra money. When available, these opportunities are very popular. The flexibility allows residents to work around health challenges and other stressors in ways traditional employment does not. The opportunities also prove to residents their own ability to and interest in work, as well as to better understand how additional income will impact their lives. By increasing opportunities for these shorter-term opportunities, the City will work with CWD to build non-traditional income and employment pipelines for residents.

- Once per week, a City-funded **day work program** managed by Old Pueblo Community Services will pick up 7 residents to work on clean ups around the city. Residents are paid \$75 for the day and given lunch, with a cap to earn less than \$600 per year for tax purposes.
- Using City of Tucson supportive services leverage funding, the City will issue an **RFP for social entrepreneurship programs** that will serve as a transition from temporary work like the day work program. The RFP will request proposals for programs that are uniquely designed to support challenges faced by Tucson House residents, while developing entrepreneurial and employment skills.
- Primavera Foundation will recruit interested Tucson House residents in their **Primavera Works** staffing program that provides general labor, moving, landscaping, and water harvesting services to local residences and businesses.

The United Way of Tucson and Southern Arizona (United Way) will provide Tucson House residents with free on-site Volunteer Income Tax Assistance (VITA) services. Many residents dismissed doing their taxes thinking they did not make enough income but then missed out on stimulus payments in 2020 and 2021. VITA on average obtains a \$1,600 refund for participating households and can assist households in retroactively receiving stimulus payments.

#### **Economic Security**

##### *Workforce Development*

- CWD has dedicated a half-time on-site **Workforce (WF) Navigator** to work with residents interested in employment to connect them with education and training. This recent addition (spring 2024) brings increased access to the traditional WF programs offers by the County. The WF Navigator, with CWD's suite of workforce solutions available, will provide a combination of career development counseling and personalized service matching, and will assist residents to

access job leads through the State system and coaching to submit job applications. Once employed, the WF Navigator will provide job retention support for at least the first 90 days to address issues that arise. New on-site and on-line workshops to be offered include career exploration, employability skills, practice interviews, resume writing, adult education, WIOA training and career assistance, and Vocational Rehabilitation.

- **WIOA vouchers** will be provided for eligible tuition, books, tools, and pre-employment goods.
- To ensure maximum flexibility, HCD plans to use City leveraged funds to create a “Barrier Removal Fund” to address needs that cannot be met through mainstream systems. The fund will be administered by Resident Services.
- CWD and the WF Navigator will convene **Pima Community College**, the **City’s Office of Economic Initiatives**, and **Pima County’s Business Services** – each of whom play a role in meeting employers’ needs in the workforce system to create entry opportunities – to develop and connect with existing training, apprenticeship, and job pipelines tailored for Tucson House residents.
- **Beacon Group**, specializing in employing people with disabilities, will host bi-weekly office hours at Tucson House to support disabled residents seeking employment with job development, placement, and retention; peer support; resource counseling and more. Beacon Group has extensive experience addressing benefits loss concerns if a household’s income increases. **Ticket to Work** is a voluntary program that allows participants to keep their benefits while exploring employment and gaining work experience.
- The United Way will offer its **Direct Care Workforce program** for residents interested in caregiving or allied health professions. A dedicated Community Health Worker (CHW) recruits and helps candidates navigate onboarding. The program pays for all pre-employment activities including training. Candidates are provided financial support to address barriers to successful program completion (transportation, childcare, language, etc.). Individuals completing the requirements are referred to partner agencies for hire. This program supports family caregivers who wish to formalize their role and will be advertised to Tucson House households with live-in aides who may be eligible to earn an income from their care duties.
- HCD will hire six **Resident Ambassadors** throughout the course of the Choice grant. Ambassadors will be paid a \$200 per month stipend for no more than 13 hours of work. These positions will be treated like jobs with interviews, job descriptions, and timecards, and supervised by the CNI Outreach Coordinator.
- In addition to the day work program, several new partners began to enroll residents in their programs and offer on-site services at Tucson House under the EEMI pilot. These new service partners will be asked to sign MOUs as they continue to offer on-site programming and enroll residents in their programs to be able to track leverage and program outcomes:
  - **Gap Ministries** will provide job skills workshops on-site such as Goal Setting and Accountability in the Workplace and will offer enrollment in their job training programs. Gap Ministries’ **Career Plus** program is a 5-week Career and Life Development program that helps unemployed and underemployed individuals increase their value in the job market. All students are supported from beginning to end: including everything from life development training and wrap-around support during their time in the program, to following them after graduation. Subsequent 5- to 10-week Career Track programs in Culinary Training, Warehouse Logistics, and Retail Training offer industry-specific training.
  - **Café 54** is a unique employment-training program for adults recovering from mental illnesses. Café trainees receive on-the-job training as cooks, pastry chefs, cashiers, and dishwashers. Two Tucson House residents are currently enrolled in this program.

*Digital Inclusion*

Access to the internet, devices, and training are vital to accessing job, health, and educational resources. While applicable to all People Plan goal areas, digital inclusion resources are described here:

- HCD will continue to fund **T-Mobile tablets** with unlimited data for residents through the construction and relocation period for up to 200 households.
- **Pima County Public Library** will support Tucson House residents with customized on-site digital literacy trainings and digital navigators through the County’s newly created **Office of Digital Inclusion**.
- One job function of the Tucson House Resident Ambassadors will be to host **Tech Support Office Hours** where residents can drop in for basic help using their devices and trouble-shooting issues.
- Residents needing digital devices will be connected to **We Care Tucson**, a Thrive partner supplying restored computers to low-income applicants.
- Partnerships with **Cox Communications** and the Digital Equity program at **Literacy Connects** will provide Resident Services with assistance on applications for low-cost internet service options.
- Community spaces at Tucson House will have wifi available, including a library with a **computer lab**.
- After the core Resident Services team is established, HCD will examine re-enrolling in HUD’s **ConnectHome** program and building internal capacity for digital inclusion support to residents through AmeriCorps VISTA.

**Ability to Save for Self and Family’s Future**

Moving from economic stability to security and then wealth building includes financial wellness, budgeting practices and incentives to save.

- The City’s **Family Self Sufficiency (FSS)** program will serve Tucson House residents through direct referrals and on-site enrollment events.
- The United Way was a key partner in EEMI and committed to coordinate with its **Financial Empowerment Collaborative** members to offer on-site workshops at Tucson House, enroll residents in their programs, and train Support Teams to be financial coaches. To date, EEMI has coordinated workshops with partners **like Vantage West Credit Union** to discuss banking and saving and Resident Ambassadors and Resident Services staff have been trained in a **trauma-informed budgeting** module to bring financial empowerment educational tools out of classroom settings and into the realm of real-world conversations.
- The United Way will provide Tucson House residents with free on-site **Volunteer Income Tax Assistance (VITA)** services.

**Resource Commitment**

Leverage Commitments: \$1,047,729

- On-site employment specialist and seminars for disabled residents (Beacon Group, \$133,760)
- On-site WF Navigator and employment workshops (CWD, \$278,561)
- VITA, Financial Wellness Partnership and Financial Empowerment Collaborative, Direct Care Workforce Resource (United Way, \$185,408)
- Barrier Removal Fund (City, \$250,000)
- T-Mobile Tablet Service (City, (\$200,000)

Choice Funds: \$144,555

- Resident Ambassador Stipends (\$126,000)
- Direct Care Workforce Resource (United Way, \$18,555)

**Table 2: Health Strategy and Expected Results by Final Year of the Grant**

**Impact Statement:** Children, youth, and adults have increased access to healthcare and improved physical and mental health outcomes. Individuals feel a sense of well-being and belonging in their community.

<b>Goals and Expected Outcomes</b>	<b>Needs Assessment Baseline</b>
<p><i>8-Year Outcomes:</i></p> <ol style="list-style-type: none"> <li>1. 95% of residents have a place of healthcare they regularly go, other than an emergency room, when they are sick or need advice about their health.</li> <li>2. 100% of residents have health insurance</li> <li>3. 60% of residents report health as excellent or good.</li> </ol>	<p><i>2023 – Source: Annual Needs Assessment Survey</i></p> <ol style="list-style-type: none"> <li>1. 87% have a place of healthcare where they regularly go, other than an emergency room, when they are sick or need advice about their health.</li> <li>2. 96% of residents have health insurance</li> <li>3. 40% of residents report health as excellent or good.</li> </ol>

**Strategies**

Health services are critically important for Tucson House residents, many of whom have substantial health care needs because they are 55 or older and/or have a disability. Overall, about 60% of surveyed residents indicated they were in “fair” or “poor” health; less than 10% reported being in “excellent” health. Having poor health impacts residents’ ability to accomplish daily tasks and goals. In the Need Assessment survey, 23% of residents reported that their mental health in the last two weeks had caused them to accomplish less than they wanted “all or most of the time”, and 30% reported the same of their physical health

There is a clear need for supplemental and wraparound health care services among Tucson House residents. According to the survey, across multiple health services, at least 20% of residents have a health care need that is not being adequately met. Dental and vision care are the top supplemental health care services needed at roughly 55% and 35%, respectively. Other areas of high need include nutrition and exercise programming, hearing, arthritis management, transportation to health care, physical mobility services, mental health care, and fall prevention services. Tucson House is the single highest call generator for the Tucson Fire Department; most non-emergency calls could be managed through health education, chronic disease management, routine primary care, or in-home assistance. Due to the COVID-19 pandemic, Tucson House has had an influx of formerly houseless residents since 2020 which has amplified the need for wraparound supports, and behavioral health and substance abuse support.

The Health Strategy brings together a team of local experts in public health, healthcare, behavioral health and addiction, social work, aging issues, recreation, and food security to deliver a continuum of health services. The Health Strategy is designed to extend beyond physical health resources to address the markers of well-being identified in the Needs Assessment, including safety concerns, resident desires for recreational and enrichment programming to combat social isolation, transportation access, and increased communication.

*Health Services Coordination*

Given the array of health needs and services envisioned for Tucson House, the Pima County Health Department (PCHD) will be the lead convener for the Health Strategy and use a public health and data informed approach to coordination of services. A dedicated on-site PCHD **Health & Wellness Coordinator** will work with the Resident Services Manager on health components, convene residents and health partners to address health priorities, create a schedule of on-site health events, and provide

training to Resident Services staff and Tucson House residents. This position will support community engagement for the updated **community health improvement plan** (CHIP) and work with the epidemiologist on the **Health Impact Assessment** (HIA) for Thrive in the 05.

- PCHD will leverage in-kind personnel support. The Clinical Services Division Manager (.05 FTE) and Community Outreach Prevention Education (COPE) Division Manager (.10 FTE), will each provide administrative oversight of clinical non-communicable diseases mobile services and expanded outreach and health promotion programming.
- PCHD will provide additional **Community Health Worker** support to conduct key activities onsite as needed, funded through other grant sources.
- Other programmatic support will include expansion of existing health promotion and health education and training activities on-site at Tucson House to be delivered by the **Tobacco and Chronic Disease Prevention** and **Community Mental Health and Addiction Program**. These classes will be offered to up to 20 participants on a bi-monthly basis and will be dedicated to target residents.
- PCHD will provide in-kind printed materials for health education and health promotion, staff and resident training as well as language services required for direct outreach services, communications and health education materials.

The Resident Services Manager will be responsible for convening health partners and outside staff on-site, including MOUs and funding agreements. The Health and Wellness Coordinator will report to PCHD, but support the Resident Services Manager in coordinating on-site health services and engaging new partners to fill gaps. On-site providers will be invited to monthly Service Providers Collaboration meetings to discuss upcoming events, hear updates, and trouble-shoot emerging issues. All health partners will be invited to quarterly Health Strategy Advisory Board meetings to discuss progress on the People Plan strategies.

#### *Physical Health*

- Arizona State University's **Tucson CARES** (Community Access, Referral, Education and Services) is a comprehensive health and wellness program that uses interdisciplinary teams of health professionals to work alongside residents to overcome obstacles to health and wellbeing. Culturally competent health and psychosocial assessments plus social work services are used to assist participants with program enrollment and empower them to take an active role in their own wellbeing. Residents are offered free health screenings from the **University of Arizona Community and Family Medicine** program to check blood-sugar, blood pressure and other health indicators. CARES supports residents to identify health barriers that may require advocacy and follow-through to maintain services.
- ARPA State and Local Fiscal Recovery Funds will increase CARES program capacity to offer more health activities and add a full time CHW and Nurse Navigator.
- PCHD will provide vaccine and testing equity services to address disparities in COVID vaccination rates and address service barriers for people with underlying health conditions that can put them at higher risk for severe COVID. CHW outreach and public health nursing and health navigation will be offered on-site through PCHD at least 8 hours per month to address non-communicable diseases, offer health education and linkages to care.
- To address access to primary care, **El Rio Health**, a Federally Qualified Health Center (FQHC), will explore mobile clinic hours at Tucson House, while working with the City to design a new health clinic in the Thrive in the 05 neighborhood. PCHD will provide in-kind **Human Centered Design** consulting to empower residents in the co-design of these new spaces.

- United Way’s **Healthy Communities Services** will give access to low-cost prescriptions through the SingleCare Program and connect residents to Arizona Long Term Care Services (ALTCs), Arizona Health Care Cost Containment System, Medicare, and other quality healthcare programs.
- **Compass Affordable Housing** currently receives City grant funding to provide Tenant Services on-site to Tucson House residents. These services are drop-in based and provide resource navigation assistance, which working in partnership with Resident Services staff, have increased the on-site staff capacity at Tucson House since before the Choice application. Compass staff have coordinated a variety of health providers on site to connect with residents including multiple local Medicare plan providers (Alignment Health, Silver Roads, ArchWell, Oak Street).

Note: With upcoming changes in funding for several of the above programs, PCHD and the Resident Services Manager will collaborate on a revised, streamlined set of on-site physical health services that complement one another and increase accessibility of services. Fundamentally, these will include a combination of 1) on-site health screenings/vaccinations/clinics, 2) peer engagement through community health workers, and 3) service coordination and navigation. Compass and Tucson CARES both came to Tucson House before the CNI grant with independent funding and have filled a void in service coordination prior to the Resident Services Team being hired. However, due to the mismatched staff capacity of both programs versus the need for services, neither was able to offer the kinds of services originally envisioned. In practice, staff from both programs have successfully participated in case conferencing with Resident Services staff and collaboratively support high-needs residents. Moving forward, it is envisioned that the CARES program will be able to focus more specifically on health navigation, while Compass will provide more general drop-in service navigation and referrals to Resident Services for longer-term needs.

*Mental and Behavioral Health / Addiction and Substance Use*

- PCHD Community Mental Health and Addiction Outreach Specialists will be on-site twice a month to address trauma, grief and loss, substance misuse, and social isolation and help residents access mental health services.
- Resident Services staff, partners and PCHD CHWs will receive training on Trauma Informed Care and culturally responsive, evidence-based interventions to promote resilience and address toxic and traumatic stress through ASU OCHER.
- Compass’s Tenant Services program has also coordinated on-site mental and behavioral health resources including:
  - Novis Vita behavioral health workshops
  - El Dorado Springs Behavioral Health Intensive Outpatient Program
  - Community Partners Integrated Services
  - HOPE Inc specialty behavioral health services
- Beginning during the COVID-19 pandemic, HCD staff developed expertise and protocols to assist residents in navigating their behavioral health treatment, including releases of information to co-manage care with case workers from behavioral health homes and supporting residents in crisis to keep them in housing. As a significant component of managing high-needs cases, the Resident Services Supervisors each have extensive expertise and will train Care Coordinators. HCD and PCHD will also seek to meet with leadership at the local behavioral health homes to enhance coordination.

*Older Adults*

Specialized services will help residents age in place at Tucson House.

- Pima Council on Aging (PCOA) will hire a dedicated **Older Adult Services Navigator** to support residents and integrate PCOA services into the Health Strategy. This position will be embedded on-site at Tucson House, with oversight by the Resident Services Manager. The Navigator will carry a caseload of low-need older adults.
- The OAS Navigator will participate in the United Way's **ELDER Alliance** to ensure the full spectrum of older adult services are available to Tucson House residents.
- The **Behavioral Health & Aging Council** will provide specialized professional development and resource sharing to Resident Services staff. The OAS Navigator will embed with the Resident Services team and have a caseload of older adults with lower case management needs, develop expertise in the Arizona Long Term Care System (ALTCS) to help residents access in-home nursing assistance, advise residents on accessibility accommodations and fall prevention strategies; and refer/enroll eligible residents into PCOA's **Home and Community-Based Services (HCBS)**.
- HCBS will dedicate 30 slots to Tucson House residents over the grant period to provide home delivered meals, grocery shopping, light in-home personal care and light housekeeping.
- United Way will connect Support Team staff and residents to **Dementia Services and Supports** via the Dementia Action Team. **Dementia Friends** sessions will increase understanding of normal aging and raise awareness about the disease. Dementia screening includes referral to medical and community-based dementia specialty services.
- The **Arizona End of Life Care Partnership (EOLCP)** at the United Way provides support to people of all ages to ensure they receive the care they want if unable to speak for themselves. EOLCP's goal is that all individuals have an Advance Care Plan (ACP) to ensure quality, goal-concordant care; reduce health care costs by avoiding hospital admissions; and reduce burden on loved ones and healthcare providers. New EOLCP services at Tucson House will work with all residents to have an ACP that can be accessed by healthcare providers, emergency responders, and hospitals if needed. ACPs will be uploaded to the Arizona Health Information Exchange for healthcare and emergency responders to access. Residents will receive help identifying and documenting a Healthcare Proxy/Power of Attorney who can be reached in case of emergency.
- Durable medical equipment will be provided by **Jewish Family and Children's Services**.

*Recreation, Socialization, and Wellness*

New recreation, fitness, and social programming tailored to the Tucson House residents seeks to improve resident physical and mental health.

- The City's **Parks and Recreation Department (P&R)** will offer customized programming.
  - Learn-to-Swim and Aqua Fitness classes will activate the pool and offer wheelchair-accessible options.
  - Classes will include yoga, chair aerobics, dance fitness, and traditional aerobics. P&R will facilitate self-directed engagement such as monthly challenges, walking clubs and a fitness library available for check-out (kick boards, walking sticks, dumbbells, etc.).
  - Social and cognitive programming will include art where completing different projects provides residents with social interaction, improve eye hand coordination, stimulate cognitive functions, and provide for intergenerational interactions among residents.
  - P&R will create a monthly calendar of activities with the H&W Coordinator to include game days like bunco and bingo, intergenerational activities, and drop-in hours for puzzles and other projects.
  - P&R will also lead walks to the adjacent Esquer Park to connect residents with nature, facilitate outdoor exercise, and participate in birdwatching.
- A new popular Writer's Group and Read Aloud Book Club are meeting regularly, organized by a Resident Services intern.

- United Way’s new initiative “**Pima County Connecting Children to Nature**” (PCCCN) will increase children’s connection to nature, including opportunities for family/child engagement in nature-based learning.
- Pets are incredibly important to residents’ mental health. The **Pima Animal Care Center** (PACC) provides quarterly on-site pet clinics that provide no cost vaccinations and check-ups. PCHD will supplement these clinics throughout the Thrive neighborhood with their Healthy Companions Program that provides pet vaccinations and STI screenings for their humans.

#### *Communication*

Given the Needs Assessment findings about communication and its impact on residents’ access to services and their sense of belonging, several strategies are outlined:

- Continued use of communications methods developed during the COVID-19 pandemic: Weekly paper newsletter delivered to each door with updates from Property Management and upcoming events (“1501 Express”), website landing page with copies of newsletter, materials, and monthly events calendar.
- Resident Services will procure mass texting technology for residents to opt in to reminders about events and appointments.
- Resident Ambassadors will pilot weekly “concierge” office hours in the Tucson House lobby to answer basic resident questions about events, redevelopment updates, and services available, referring residents to Resident Services and Property Management as appropriate.

#### *Food Security and Nutrition*

Access to healthy food options, nutritional education, cooking classes, and gardening opportunities will further support resident health.

- Blue Moon Community Garden operator, **Community Gardens of Tucson** (CGT), will leverage funding to hire a Tucson House resident as a garden coordinator and provide incentives to tend community plots.
- The **UA Garden Kitchen** is committed to on-site nutrition and cooking classes and the **Community Food Bank** (CFB) will provide monthly garden education.
- To address emergency food needs, CFB will provide monthly food boxes and enroll older adults in specialty food programs.
- The proposed CCI Project - **Community Food Hub and Accelerator** - will have space for classes, farmer’s markets, and emergency food storage. Tucson House will also have a classroom space that can host nutrition classes.
- The City will coordinate a partnership between the new El Rio Health Center and CFB to launch a “**Food Rx**” program, where health care providers “prescribe” a certain dollar amount of fruits and vegetables to their low-income patients, making it easier for them to access the fresh fruits and vegetables they need for balanced, healthy diets.

#### *Transportation*

Transportation impacts many health outcomes. Even when residents can purchase food, transportation is a significant barrier to acquiring healthy food. The bus ride to the full-service grocery store 2 miles away can take up to 45 minutes one way and involves switching buses. Residents face the same challenges filling prescriptions. While transit fares have been free during the pandemic, Tucson’s Mayor and Council have not made a final decision on maintaining fare-free transit in the long-term, and residents are concerned about how they will pay bus fares.

- A new partnership with **Sun Tran** provides Tucson House residents with free bus passes for the duration of the grant.

- Sun Tran is also committing 8 hours per week of dedicated **Sun On Demand** shuttle service to address resident needs. For example, the shuttle will pick up and drop off residents at the grocery store. Sun Tran staff will engage residents to determine destination preferences and could include special outings such as to the zoo or the County Fair.
- HCD has established a relationship with UA to explore funding opportunities to pilot supplemental transit services for low-income residents along the Oracle Corridor since the Stone Avenue Corridor was selected for a Bus Rapid Transit line.
- HCD is purchasing three vehicles for the Resident Services team using a combination of Choice funds and City General Funds. Vehicles will be used by staff to travel to relocation and replacement housing sites, and will be available to assist with transporting residents when necessary. A larger van with a wheelchair lift will be used for shuttles and field trips as well.

*Safety*

Many safety-related issues are being addressed through the building design at Tucson House, including enhanced badge access by floors, bringing Resident Services and Property Management offices into the building, security cameras, and perimeter fencing. As a non-enforcement strategy, monthly Safety Meetings are hosted by a Community Enrichment Coordinator from the City’s **Community Safety, Health and Wellness** program. These meetings were popular under the Department of Justice’s Community-Based Crime Reduction grant during the planning phase and are now being coordinated by City staff, with attendance by the Tucson Police Department and Property Management. Topics have and will include fire safety, Narcan and overdose prevention, when to call the police, etc.

**Resource Commitment**

Leverage Commitments (\$5,690,000)

- Health and Wellbeing Program, Vaccine and Testing Equity services, Community Mental Health and Addiction services, Health Literacy communications, Human Centered Design consulting, Health Impact Assessment and Data Support (PCHD, \$309,590)
- Partnerships & Resource Networks, Dementia Capable Southern Arizona, AZ EOLCP, PCCN (United Way, \$658,529)
- Custom Shuttle Service and Universal Bus Passes (Sun Tran, \$1,088,000)
- Home-Based and Community Services - 30 dedicated slots (PCOA, \$1,750,000)
- Mobile Food Distribution and Garden Educator (CFB, \$258,098)
- Tucson CARES and SAMHSA CHW trainings (ASU OCHER, \$863,683)
- On-site recreation programming (Tucson P&R, \$763,000).

Choice Funds (\$2,275,421)

- OAS Navigator (PCOA, \$390,000)
- H&W Coordinator (PCHD, \$410,150)
- Recreation Programming (Tucson P&R, \$763,000)
- Tucson CARES (ASU OCHER, \$500,000)
- Dementia Services and Supports and EOLOP (United Way, \$212,271)

**Table 3: Early Learning Strategy for Children Ages 0-5 and Expected Results by Final Year of the Grant**

**Impact Statement:** Children enter kindergarten ready to learn.

**Goals and Expected Outcomes**

*8-Year Outcomes:*

**Needs Assessment Baseline**

<ol style="list-style-type: none"> <li>1. 100% of children 0-5 participate in center-based or formal home-based early learning settings or programs</li> <li>2. 75% of children in kindergarten demonstrate at the beginning of the program or school year age-appropriate functioning across multiple domains of early learning.</li> </ol>	<p>2023 – (S)=Annual Needs Assessment Survey, (TUSD)=School District</p> <ol style="list-style-type: none"> <li>1. 0 / 0% of children 0-5 participate in center-based or formal home-based early learning settings or programs (S)</li> <li>2. N/A* children in kindergarten demonstrate at the beginning of the program or school year age-appropriate functioning across multiple domains of early learning. (TUSD) *Due to the small number of young children at Tucson House, no target residents entered kindergarten in the past year</li> </ol>
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**Strategies**

There were only 3 children under the age of 5 at Tucson House at the end of 2023. One Care Coordinator and Peer Support Specialist team (Family Support Team) will carry the caseloads of the 13 families with children under 18 living at Tucson House. This team will be trained to become experts in services for families with children, including navigating the childcare system and early childhood services. They will enroll, track, and support the attendance of these children in high-quality, evidence-based early education programs, and ensure children receive regular developmental screenings and connect with appropriate services. The Family Support Team will collaborate with the **United Way’s Cradle to Career (C2C)** partnership who will serve as the key convening education partner. Additional core early learning partners include the **Pima Early Education Program (PEEP)** hosted within CWD, United Way’s **First Focus on Kids (FFK)** coalition and **Family Support Alliance (FSA)**, and **First Things First**, Arizona’s early childhood agency. The Family Support Team will embed into the C2C (which includes the Kindergarten Readiness Change Network) and FFK frameworks.

C2C is a results-focused collaborative that seeks to align organizations, institutions, and individuals to change systems so every young person is fully supported in an equitable way. FFK works to improve childcare quality, promote early literacy, support home visitation and parent education, improve teacher education, and awareness of the importance of quality early care and education. FFK members include school districts, statewide Child Care Resource and Referral agency, childcare providers, First Things First and representatives from DES childcare subsidy. Collectively, the group has resources that can provide additional capacity to Support Team staff. For example, FFK members will provide training on childcare subsidy, scholarships, and system navigation, and outreach materials to families of children under age 5, including Head Start/Early Head Start, Pima County Preschool Scholarships, and DES Child Care subsidy.

In Spring 2021, the Pima County Board of Supervisors created Pima Early Education Program (PEEP) scholarships, designed to assist up to 1,200 children from income-eligible families attend a high-quality preschool across Pima County. By collaborating with state and federal programs, the target is to assist all income-eligible families. The Family Support Team will review preschool and childcare options with families with children under 5, including enrolling in a high-quality childcare/preschool through a PEEP scholarship dedicated to Tucson House residents. Four high-quality PEEP childcares, including one home provider, are within one-half mile of Tucson House. Two are even closer to the Sugar Hill on Stone and Stone/Speedway replacement sites which will have 2- and 3-bedroom units. A new PEEP public preschool class was started at Nash Elementary School. The State of Arizona recognizes high-quality preschools as those in the State’s Quality First program with a rating of 3-5 stars, in the Federal Head Start program, or nationally accredited preschools. All providers that receive PEEP scholarships are part of the Quality First program, which ensures developmental, health, and behavioral health

services are provided. High-quality programs that qualify for PEEP are located all over the city, so the Family Support Team will work with relocated families to find the location most convenient for them. CWD will assist the Family Support Team in tracking enrollment of Tucson House children in PEEP. In support of PEEP funding, United Way's Accelerate Quality program will target Quality First programs near Tucson House for coaching and technical assistance, small improvement grants, and assessments to move 3-star programs to higher ratings.

The Family Support Team will also coordinate parenting and parent and child programs for Tucson House families in partnership with United Way's Family Support Alliance (FSA), a broad collaboration of organizations and agencies providing services to families with young and school-aged children. FSA partners provide in-home parenting education including regular home visits; operate a referral system for families; offer developmental and sensory screenings; support for pregnant teens and/or teen parents; connections to community resources; parenting classes; and early literacy resources. FSA staff will provide targeted outreach to families about services, and professional development and training on the referral system for the Family Support Team. Interested parents will be subscribed to the Family Support Newsletter. FSA will host a new monthly Stay and Play class at Tucson House for young children (ages 0-8) where a facilitator models positive parenting behaviors with families while engaged an appropriate play experience.

The Family Support Team will coordinate field trips to Pima County Public Libraries (PCPL) for young children programming like Family Storytime, Storytime for Babies, and Bilingual Storytime. PCPL's Ready, Set, School! is a free 8-week program to help children and parents get ready for school. Children 4 and 5 will build school ready skills through stories, songs, and activities. Parents will learn practical ideas to help their children become successful learners. Additional early literacy programs, like Make Way for Books, will be offered.

In August of 2022, the Arizona State Board of Education approved Teaching Strategies Gold (TSG) as the Kindergarten Entry Assessment tool and requires all kindergarten students be assessed within the first 45 days using TSG starting with the 2023/24 school year. The data will also allow early care providers to tailor support for young children in their care to strengthen the core areas of kindergarten readiness. The Family Support Team will work with C2C, First Things First, and the Tucson Unified Schools District (TUSD) to track and monitor assessment data for preschool Tucson House residents and share results once a child begins kindergarten.

Given the small current population of young children at Tucson House and their individual situations, these strategies are designed to be adapted to each family's needs no matter where they are relocated or whether they choose to move into a replacement site. The Family Support Team will have access to a vehicle to travel to locations most convenient to families. By plugging into city-wide resources like the FSA, the Family Support Team will be able to connect families to programs that best suit their needs, like coordinating attendance at a new Stay and Play class once relocated.

**Resource Commitment**

Leverage Commitments (\$417,545 total)

- Stay and Play Class (United Way, \$14,345)
- 4 PEEP Scholarships (CWD, \$403,200)

Choice Funds (\$39,432)

- Stay and Play (United Way, \$39,432)

<b>Number and percentage of target resident children in kindergarten who demonstrate at the beginning of the program or school year age-appropriate functioning across multiple domains of early learning as determined using developmentally appropriate early learning measures</b>
<b>Number and percentage of target resident students at or above grade level according to State mathematics assessments in at least the grades required by the Elementary and Secondary Education Act (ESEA) (3rd through 8th and once in high school)</b>
<b>Number and percentage of target resident students at or above grade level according to State English language arts assessments in at least the grades required by the Elementary and Secondary Education Act (ESEA) (3rd through 8th and once in high school)</b>
<b>Number and percentage of target resident students who graduate from high school on time</b>

**Table 4: Education Strategy for School-Aged Children and Expected Results by Final Year of the Grant**

**Impact Statement:** Children are proficient in core academic subjects. Youth, including youth with disabilities, graduate from high school college-and/or career-ready.

<b>Goals and Expected Outcomes</b>	<b>Needs Assessment Baseline</b>
<p><i>8-Year Outcomes:</i></p> <ol style="list-style-type: none"> <li>1. TBD - target resident students at or above grade level according to State mathematics assessments in at least the grades required by the Elementary and Secondary Education Act (ESEA) (3rd through 8th and once in high school)</li> <li>2. TBD - target resident students at or above grade level according to State English language arts assessments in at least the grades required by the Elementary and Secondary Education Act (ESEA) (3rd through 8th and once in high school)</li> <li>3. TBD - target resident students who graduate from high school on time</li> </ol>	<p>2023 – Source: Schools data (FERPA release)  <i>Note: Current ELA and Math scores are not available for Tucson House students. Data is Tucson Unified School District (TUSD) averages for low-income students. Family Support Team will work to obtain a signed Family Educational Rights and Privacy Act (FERPA) consent form with each family to collect student information.</i></p> <ol style="list-style-type: none"> <li>1. 14% TUSD students at or above grade level according to State mathematics assessments</li> <li>2. 21% TUSD at or above grade level according to State English language arts assessments</li> <li>3. 81% TUSD students who graduate from high school on time</li> </ol>

**Strategies**

The 13 school-age children at Tucson House attend 8 different schools; most were houseless prior to living at Tucson House. The Family Support Team will specialize in K-12 education, family supports, and college- and career-readiness, and coordinate directly with school support staff and community partners to offer programs to Tucson House families. The Family Support Team will manage referrals and connections to outside partners and resources.

Three school districts serve the Thrive in the 05 neighborhood, but Tucson House and the family replacement sites are in Tucson Unified School District boundaries. Thus, the Family Support Team will

work closely with TUSD to incorporate district services at Tucson House and ensure minimal educational disruption for students during relocation. Understanding this underlying trauma and disconnection, TUSD's Equity, Diversity, and Inclusiveness Department (EDI) has committed to engaging students and families with programming at Tucson House. EDI will develop a phased engagement program which may include: on-site afterschool and/or weekend programs; education on the TUSD Magnet program and "Magnet Mixer" to show the choices families have; connections to offsite TUSD resources like field trips to the nearest Family Resource Center, a five-minute ride away. The EDI engagement program will focus on building relationships first and foremost with children and families to establish trust and connection to the school district. EDI's Tucson House program will also work with the Family Support Team to understand the student supports available, build cooperative relationships, and share case tracking between the school and Support Team. This includes the Multi-Tiered System of Support which supports students in the areas of academic, social, emotional, and behavioral needs, and makes data-informed suggestions and solutions. This may include reassessing special education needs and ensuring Individualized Education Programs (IEP), Multidisciplinary Evaluation Team Reports (MET), and/or 504 Accommodation Plans are up to date. TUSD's Family and Community Engagement Department coordinates support for families including Family Resource Centers, Homeless Education and Resource Team, clothing bank, food pantries, and engagement classes. Family engagement classes include English language classes for adults, Story School from Make Way for Books, Life Skills for Parenting, Computer Class, Support Group, as well as online classes.

Tucson House is in the Roskrige K-8 and Tucson High catchments. Both are Magnet schools that offer optimum choices for public school education. Magnet programs are part of TUSD's efforts to support integration and increase academic achievement, graduation rates and parent engagement. Roskrige's Dual Language Program features language education that involves children in daily communication and content in English and Spanish. Roskrige offers free 21st Century Community Learning Center after school programs and extracurricular sports, and tutoring. Tucson High offers Magnet programs in Fine and Performing Arts and STEM, with Career and Technical Education providing industry-standard skills and program certificates. Tucson High also offers free before/after school clubs, extracurricular sports, and free tutoring.

United Way will target several high-quality programs to Tucson House youth that support learning and college- and career-readiness:

- My Summer Library provides 12 free books to K-3 children over the summer.
- Youth on the Rise targets youth ages 16-24 not engaged in school or work through a network of service providers in areas including: acquiring documents, basic needs, disability, education, employment, financial assistance, health services, housing, legal, LGBTQ, mentoring, pregnancy and parenting, substance use, and transportation.

The Family Support Team will ensure children start school with the supplies they need, coordinating back to school backpack giveaways each year.

Resident Services will host a monthly "Casa Connections" resource group for families with children to build rapport and community within this often-overlooked demographic group, particularly before relocations begin. Presentation and discuss ideas will be generated by attendees. Food and children's activities are provided and older children are encouraged to participate in the discussions.

Students will be connected to nearby PCPLs offering free programs, including in-person homework help, and clubs, plus on-demand virtual tutoring and Brainfuse that students can access from home. The three Tucson Recreation Centers within a 1.3-mile of Tucson House offer youth/teen programs including

Junior Staff in Training, Junior Lifeguard in Training, KIDCO Afterschool and SchoolzOut Camps for youth 6-11 and teens 12-14, PeeWee and Youth Drop-in for ages 5 and up. Activities are free or discounted and offer safe places for youth and teens to be after school and during school breaks. Five KIDCO Afterschool and Summer scholarships, removing cost barriers as well as committing slots in a high-demand program, ensure Tucson House families have a space for their children each summer.

The 2024 Needs Assessment Survey will specifically focus on the needs of the six high school age youth at Tucson House and develop program ideas to support them as a cohort, such as adapting the YES (Youth Empowerment Solutions) program which focuses on leadership skills and resource mobilization to Tucson House youth. YES was developed through the DOJ Community-Based Crime Reduction grant for Thrive in the 05.

**Resource Commitment**

Leverage Commitments (\$427,358)

- My Summer Library, Partnerships & Resource Networks - First Focus on Kids, Family Support Alliance, and Youth on the Rise (United Way, \$408,608)
- 5 KIDCO Afterschool and Summer scholarships (\$18,750)

CNI Funds: TBD

**III. Case Management**

The case management approach for Tucson House has been designed to best serve the needs of current residents and expand existing services to offer a higher level of support to truly stabilize households and increase resilience and well-being. Existing households present a different demographic than what is typically found in family public housing – 69% are 55 and older, 71% report a disability, and only 4% are children 18 and under. Roughly a third of households were housed at Tucson House after experiencing homelessness. The goal will be to improve resident outcomes in income and employment, health, and education as well as ensure resident’s housing stability and successful relocation either back to a rehabilitated unit at Tucson House, a new off-site replacement housing unit that best meets their needs, or another permanent relocation option of their choosing.

While these emergent efforts are producing measurable results, increasing linkages to employment and health services, new wraparound case management and data support will provide the individualized services necessary to achieve resident’s goals.

As the People Lead, HCD is on-boarding a Case Management Team dedicated specifically to working with Tucson House residents. See organizational chart below. Overseeing the Case Management Team is a Resident Services Manager who will be responsible for the overall execution of the People Plan, including coordination with core and leverage partners, managing subrecipient agencies and their contracts for the provision of agreed upon services, and supervising two Resident Services Supervisors. The Supervisors will oversee two Care Coordinators (case managers) and two Peer Support Navigators each. In total, 10 members of the Case Management Team will have resident caseloads; the only member without a caseload is the Resident Services Manager.

Residents will be assigned to a case management “Support Team” which will include a Care Coordinator and a Peer Support Navigator. The Care Coordinator will be responsible for completing assessments, individual service plans, coordinating referrals and linkages to community supports and overall service coordination. The Peer Support Navigator will provide hands-on support to address identified service needs, i.e. meeting a resident’s needs for transportation, budgeting, basic living skills, and attending appointments.

The anticipated client to staff ratio will be 40:1; each Support Team will have a caseload not to exceed 100 households. Based on resident demographics, each Support Team will specialize in subject matter relevant to their clientele. For example, one Support Team will be dedicated to families with children and can build more comprehensive relationships with partners in the education area to support these households. Likewise, one Support Team will develop expertise in service coordination for recently houseless residents and the unique challenges they face to maintain housing stability. This will allow Support Teams to establish and maintain relationships with residents throughout the relocation process. This will also enable the Support Teams to support each other with specific expertise in their selected area and not require every Support Team to have expertise in every area.

Employing a comprehensive, trauma-informed, peer coaching model, households enrolled in case management will be contacted no less than monthly by a Support Team member. The frequency of contact will be adjusted based on a household’s needs, with some requiring weekly or more frequent contact.

Annual assessments will be completed with each household to track resident outcomes. Every 6-months, Support Teams will look to sit down with households for an in-depth, full case review of their goals and progress. The case management activities include but are not limited to: screening and risk management assessments; individualized service planning based on resident needs and choices; provision of options and information; linkage and referrals to formal and informal services and supports; service coordination at the client-level; crisis intervention; follow-up; advocacy; monitoring/evaluation of resident progress; timeliness and effectiveness of service delivery; and maintenance of records.

In addition to the HCD Resident Services Team, several support staff will be funded through the grant or in-kind partner leverage commitments. Where appropriate, these staff will have a caseload – for example, the part-time Workforce (WF) Navigator through Pima County’s Community and Workforce Development (CWD) Department; and a full-time Older Adult Services (OAS) Navigator through Pima Council on Aging (PCOA).

The Resident Services Manager and Supervisor will lead the assignment of caseloads, seeking to evenly distribute active and inactive residents as well as high versus low acuity residents across care coordinators. Every household will be assigned a care coordinator as a main point of contact, who will coordinate referral to on- and off-site partners. The Resident Services Manager will coordinate with and oversee partner staff on-site and maintain close communication with supervisory staff at host agencies. As appropriate, cases will be assigned to partner staff during case conferencing meetings. All staff with a caseload (both Resident Services and on-site

partners) will have access to TAAG and will be expected to track household engagement in the software to ensure non-duplication of services.

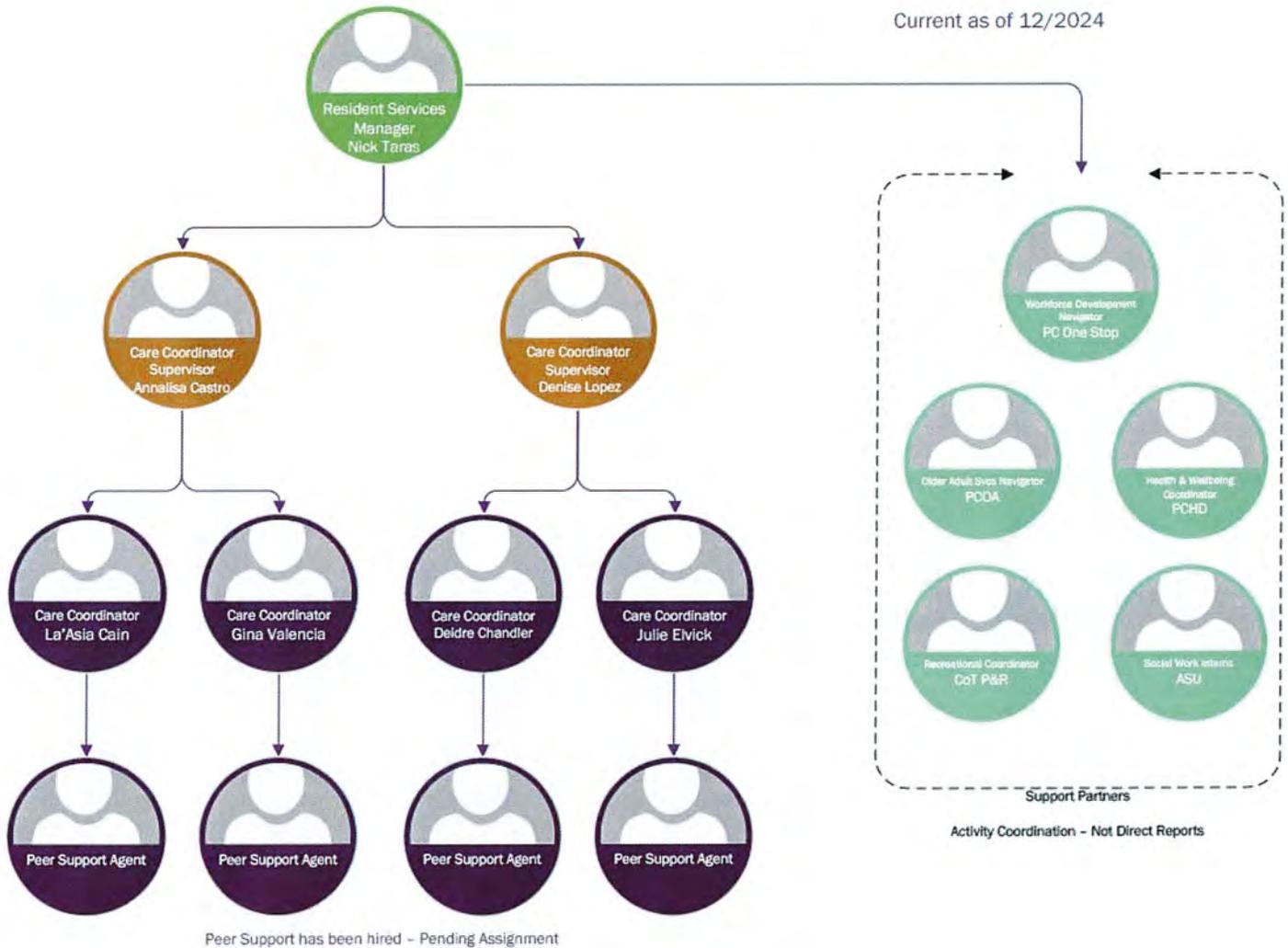
Additionally, each semester, HCD will host eight Bachelor and Master level social work students (the annual equivalent of 2 FTEs) from the ASU School of Social Work as interns to support case management. The RS Manager and a supervisor have been certified to provide field supervision for ASU MSW students. ASU interns will assist in program development and program participation utilizing best and promising practices in addition to assisting the team with resource development and connecting residents to resources. With these additional positions, the household-to-staff ratio will be 28:1. Other staff include a Health and Wellbeing (H&W) Coordinator through the Pima County Health Department (PCHD) and part-time Recreation (Rec) Coordinator to support the Health Strategy at Tucson House.

HCD will execute a data sharing agreement with all parties, including other City Departments, subrecipient agencies, Pima County and other organizations or agencies providing services at Tucson House. This will enable the sharing of personally identifiable information that is needed to ensure residents are receiving services, an agency can follow up quickly in a crisis, and to minimize the barriers and burden on residents accessing services. Furthermore, a case management software – Tracking at a Glance (TAAG) has been procured and will be onboarded to track cases, referrals, and outcomes. HCD will provide access to partners like CWD and the PCOA OAS Navigator as software users to increase efficiency.

Given the high level of partnerships and subject matter experts committed to providing quality wraparound services at Tucson House, the following meeting structure is proposed to maintain both buy-in among partners and to align resources and strategies:

- Case Conferencing: Weekly meetings with on-site providers managing cases and coordinating services (i.e. HCD Resident Services, Compass, Tucson CARES, Older Adult Navigator, WF Navigator, etc.) to trouble shoot individual resident cases.
- Service Providers Collaboration: Monthly meetings to discuss upcoming events, emerging challenges and trends, and report on successes. The audience is primarily regular on-site service providers.
- Strategy-specific Advisory Board: Quarterly, all partners under a given strategy (health, income and employment, education) gather to troubleshoot challenges and discuss new or adjust existing resources to meet resident needs.
- Annual Joint Advisory Board: All partners across strategy areas meet to review annual needs assessment results, outcomes, and People Plan revisions.

### Resident Services Organizational Chart



#### IV. Relocation & Re-Occupancy

Tucson House, the CNI target housing site, will be redeveloped over the course of 30 months as the first phase of the housing strategy due to the need to begin much needed renovations as soon as possible to ensure and maintain safe and quality housing for residents. However, this means new replacement housing is not immediately available for residents. Additionally, during planning, resident preferences identified the need to transition Tucson House to housing for older adults 55 and over. Construction will occur at Tucson House in rolling phases beginning in Q2 2025, requiring some residents to move out of their units, while others will remain in their unrenovated unit until their floor is ready for construction.

The relocation and re-occupancy plans seek to maximize housing choice while minimizing disruption to residents.

### *Relocation Options*

Households will be surveyed starting in summer 2024 to discuss their individual preferences and options for relocation. Because Tucson House will become a 55+ community, the relocation options available will not be the same for all households:

- Households with children under 18 – these households will be relocated off-site. Relocation options will include a Housing Choice Voucher, or a comparable available public housing or HCD-owned unit. Timing for these relocations will be coordinated in partnership with families to minimize schooling disruptions as much as possible.
- Households with all adults under 55 – These households will be relocated off-site. Relocation options will include a Housing Choice Voucher, or a comparable available public housing or HCD-owned unit. These households can request a reasonable accommodation to relocate on-site at Tucson House and then to re-occupy a renovated unit if they meet eligibility criteria including lease compliance, contingent upon the City/Gorman ability to remain in compliance with the Housing for Older Persons exemptions to the Fair Housing Act requirements (i.e. no more than 20% of units can have households in which all occupants are under age 55).
- Households with at least one adult over 55 – These households will have the option to relocate on-site at Tucson House, or opt to receive a Housing Choice Voucher or move into a comparable available public housing or HCD-owned unit.

For households that opt to relocate on-site at Tucson House, they may be relocated into an unrenovated or renovated unit depending upon when relocation occurs during the construction period. These households will be made aware of the potential challenges associated with living at Tucson House while renovation activities take place (e.g. noise, dust, service disruptions, etc.).

### *Relocation and Mobility Support and Education*

Gorman & Co. has contracted with Revival Development Services (Revival) to manage the relocation process. Gorman, HCD, and Revival will work in close coordination to provide relocation planning and education to residents in accordance with HUD regulations. During biweekly meetings and special meetings as needed, the Project Team meets specifically to discuss relocation planning, and prepare for update meetings with residents. In addition to Gorman, Revival and HCD, these meetings include the Housing Choice Voucher Administrator and the Resident Services Manager when hired. Every other month, the Project Team hosts update meetings with Tucson House residents, discussing progress on the CNI grant, design, construction, and relocation, and answering questions. Each meeting, the team prepares new answers to a published FAQ which is supplemented with presentations and explainers. To ensure accessibility, the meetings are held in-person on-site, and broadcast live via Zoom with a call-in option that allows residents to view the meeting later or dial in by phone. A speaker system and Zoom closed captions assist residents with hearing difficulties. Spanish interpretation is provided and other languages (Vietnamese and Arabic spoken in the building) are available upon request. In addition to these regularly scheduled meetings, the team has begun hosting Lunch & Learns with free food to explain certain topics in more depth. In July, the topic was Relocation Options to get acquainted with both replacement and relocation options for residents and their right to return. Future Lunch & Learns will walk residents through what to expect from the relocation and moving process, how the Housing Choice Voucher program works and how it is different from public housing, and the re-occupancy policies.

Meetings and updates are published through a weekly 1501 Express delivered door-to-door, as well as flyers around the building. HCD is currently hiring Resident Ambassadors that will also host office hours and answer questions in between these larger meetings.

Revival will conduct interviews with households to determine their housing needs and preferences, creating individualized relocation plans that help residents in making the best choice for their household, align with timing of construction, and ensure a smooth transition to their temporary or permanent housing. Revival will work closely with Resident Services to coordinate individualized support to households. As feasible, Revival will schedule relocation interviews with a household's Case Manager or Peer Support Specialist to ensure seamless support. When not feasible, Revival will provide referrals to Resident Services for support with specific issues and share notes from interviews under a data sharing agreement. In onboarding its new case management software, HCD will evaluate whether a relocation module is available that can be utilized by Revival to further streamline referrals and information sharing. Resident Services staff will be key partners in communicating accurate relocation information, addressing concerns, and managing fears and anxiety. Resident Services will advise Revival on outreach to households that may have communications or other challenges.

RDS will manage all required notifications, relocation interviews, transferring utilities and cable/internet services, reimbursements for moving expenses and other logistics associated with move-out with referrals to Resident Services for additional on-site support to assist residents. Residents will be notified about relocation using multiple methods of communication that includes notifications through mail, individual telephone calls, depersonalized door-to-door announcements, and door-to-door visits.

Households opting to utilize a HCV for relocation will be offered housing mobility counseling beyond what is required by the URA to ensure that HCV holders have a real opportunity to use vouchers in high opportunity areas. Mobility counseling includes assistance to make households aware of, have access to, and can locate high-quality rental housing in areas of integrated opportunity which provide access to educational opportunities, transportation, and lack of environmental health concerns. Supports to be provided include briefings about what high opportunity neighborhoods are, identifying available units in these locations, providing transportation to visit units, assisting with completing leasing paperwork, providing information about fair housing protections, and providing information about the portability of vouchers. In addition to mobility counseling provided to households, the Revival will collaborate with the City's Housing Choice Voucher division to identify and recruit landlords to participate in the HCV program and/or adopt expedited lease-up processes.

Relocation counseling and services will be integrated with the People Plan and the case management services and supports made available under CNI to ensure residents receive the array of services they need to return to a replacement housing unit and/or maintain stability in other housing of their choice. This includes regular check-ins with households that have relocated off-site to ensure their continued stability and transition to the new location. For households that move off-site, Resident Services will track and offer services for the remaining eight years of the grant. Residents that decline services after the move will be contacted on no less than a quarterly basis to check in on progress and update the household on replacement housing options. Families with children will be tracked by their Case Manager with special care and coordination with the appropriate schools, connecting families to education resources with support from the United Way's Cradle to Career network. Residents relocated to other HCD or Gorman properties will be tracked for lease violations and eligibility as described above. For residents that take a HCV, Resident Services will reach out to the property manager of the new housing to establish and maintain a line of communication and support those households.

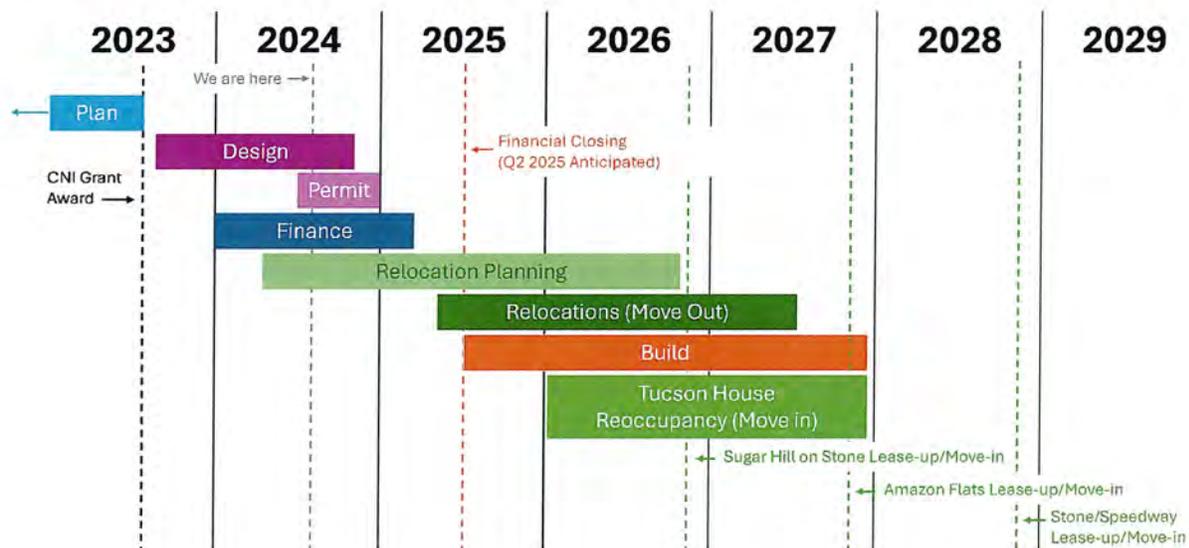
*Right to Return and Re-occupancy*

Through the communications tools described above, the Project Team is working to ensure all residents understand their right to return to a replacement housing unit and their eligibility for the different replacement housing options as a part of the relocation process. Resident Services will include counseling about the right to return and the requirement to remain lease compliant in conversations with residents. When replacement units are ready for re-occupancy, residents will be notified 60 days before the units come online. Notifications will include instructions on the steps needed for a resident to exercise their right to return. Resident Services will follow-up with each resident via telephone calls and in-person meetings to help residents understand the process and assist them in completing the needed steps to return if they so choose.

The current anticipated schedule for when replacement housing units will be available for occupancy is shown in the redevelopment timeline below.

**TUCSON HOUSE REDEVELOPMENT TIMELINE**

*Updated December 2024  
All dates subject to change*



As shown in the timeline, replacement units at Tucson House will be ready for occupancy first but will be a 55+ property. Therefore, as renovated units are brought online, they will be reoccupied first by households with at least one member who is 55 or older according to the following priorities:

- 1st Priority: ADA Accessible Units and Reasonable Accommodations (RA): Households requiring an ADA accessible unit or having a RA will be moved into an appropriate unit as they become available. This includes households relocated off-site if they could not be accommodated on-site. This priority will remain in effect until all ADA units are occupied and all RAs are met. •
- 2nd Priority: On-Site Temporary Relocations: Households that opted for temporary relocation on-site will be offered the next available renovated unit that meets their household size based on who has been relocated for the longest period (i.e. First Out, First In - "FOFI"). As each floor opens for occupancy, any household that previously lived on that floor and has not already accepted a renovated unit on a different floor will be offered a unit first. The total number of units at Tucson

House is decreasing; therefore, not all original units will exist post-renovation. If a household's original unit is still available and they qualify to reoccupy that unit according to policies outlined here, they will receive first priority to reoccupy that unit if desired.

- 3rd Priority: Upcoming Construction Phase: Households that are in the next construction phase and are eligible to remain at Tucson House will be offered the next available renovated unit that meets their household size. This represents a one-time move to a renovated unit and will satisfy the right to return requirement for that household.
- 4th Priority: Open call to all residents, on-site or off-site, regardless of relocation status, to occupy any available renovated Studio apartment.
- 5th Priority: Off-site Relocations: Households who opted to relocate off-site and are eligible to return to Tucson House will be offered the next available renovated unit that meets their household size based on a FOFI approach.
- 6th Priority: Previously Offered: Households who are offered a unit under the above priorities may choose to decline the unit offered but remain on the list to await a unit offer on a different floor.

This priority order will be repeated as each new phase of renovated units are ready for occupancy at Tucson House.

#### Non-Tucson House Replacement Housing Units

As the other new housing phases containing replacement units are built (Sugar Hill on Stone, Amazon Flats, and Stone/Speedway) - all of which will be general occupancy properties - these replacement units will be offered in the following priority order:

- 1st Priority: ADA Accessible Units and Reasonable Accommodations: Households ADA accessible units or requiring reasonable accommodations will be moved first into these units as they become available.
- 2nd Priority: First Out, First In: Households that have been relocated for the longest period of time (i.e. First Out, First In - "FOFI") and have not previously been made a replacement housing offer will be offered the next available replacement unit appropriate for their household.
- 3rd Priority: Previous Replacement Housing Offer: Households that declined a previous replacement housing offer(s).

#### Special Circumstances

Additional guidance and policies will be added in this section to clarify how the above priorities will be applied under specific circumstances.

- Households under 55: Households with no members 55 years or older will have the option to request a Reasonable Accommodation to remain on-site, in an unrenovated unit, as a temporary relocation option and then, if the RA is approved, to reoccupy a renovated unit at Tucson House. Re-occupancy by households with all members under 55 will occur according to the same priority order above, contingent upon Tucson House occupancy remaining in compliance with the Housing for Older Persons exemptions to the Fair Housing Act requirements (i.e. no more than 20% of units can have households in which all occupants are under age 55).

- 16th Floor: Due to extra construction work needed to fortify the supports for the 17th floor, the units on the 16th floor will not be ready for re-occupancy for an extended period of time. Households living on the 16th floor will have the option to:
  - a) Be placed on a specific 16th floor waiting list to receive unit offers on the 16th floor when it comes online. This means the household will not get offers for any floors that are available for re-occupancy before floor 16.
  - b) Be placed immediately after the residents of floor 15 are optioned and then become part of the standard prioritized process outlined herein.
- Studios versus 1BRs: Households that qualify for a 1BR also typically qualify for a studio regardless of a household's preference for a 1BR unit. As a result, a household could be offered a studio unit even though they were originally living in a 1BR. The household is within their rights to "hold-out" for a 1BR unit, but they will be placed at the bottom of the current prioritization list upon choosing not to take the replacement unit offered to them. There is no guarantee that the household will ever be offered a 1BR unit based on prioritization and unit availability.

## **V. Housing Stability**

Tucson House will transition from City of Tucson Housing and Community Development Property Management (HCD-PM) to Gorman & Co Property Management (GPM) at financial closing. Future CNI Housing phases will also be managed by GPM. To best support housing stability of households prior to this transition, HCD-PM has been working with Resident Services to flag residents at risk for eviction, including connecting household to rental assistance for those in arrears. Resident Services developed a referral form for HCD-PM to flag residents experiencing crisis or otherwise displaying behaviors that may put their housing at risk. As the transition in property management approaches, GPM will meet with HCD-PM, HCD Resident Services, and the Relocation Team to flag residents with multiple minor lease violations. The team will develop an educational plan to prepare residents for expectations under GPM. HCD will also develop objective standards to pursue eviction of residents with persistent and egregious lease violations.

GPM, Revival, and Resident Services Case Management Team will meet monthly to discuss updates on resident cases in progress, new referrals, communications regarding relocation and property development and flag residents at risk of eviction. This meeting may occur more frequently leading up to and during relocation. This meeting ensures that all three teams understand and are working collaboratively toward common goals for all residents of Tucson House. This collaboration will ensure that residents will have all the resources, services and assistance available to be lease compliant at the time of move and return. This meeting will discuss early warning alerts of residents at-risk of eviction, progress on residents that are receiving eviction prevention services, and identifying additional resources or needs that residents have to remain housed at Tucson House or an agreed upon replacement housing unit.

Eviction Prevention: GPM will keep Resident Services apprised of residents with rent debt to connect those residents with the appropriate resources to provide rental assistance. Resident Services will work closely with the resident to develop a repayment and budgeting plan and communicate progress made to GPM. For residents that are at risk of eviction due to behavioral or lease violations, GPM will provide the details of the situation to Resident Services so that they may connect with the resident to correct behavior and solicit further resources to assist the resident in their success with the necessary change. For instance, if a resident is belligerent with staff or other residents, providing education on appropriate interactions and conversations with others would be of benefit to assist the resident in correcting the behavior.

Upcoming lease signings: GPM will provide Resident Services with a list of units/residents that will be signing a renewal lease agreement within the next week. GPM will schedule a lease signing appointment with the resident and the Care Coordinator to review the terms of the lease with the resident and check for understanding of the lease, addendums, and community guidelines. GPM will hold an education class annually with Resident Services team to review the lease, addendums, and community guidelines so they understand the lease and landlord/tenant laws and may in turn assist residents with any questions regarding the lease.

Lease violations: GPM has the right to evict based on lease violations, repeated offences, and not cooperating or participating in the Section 8, Section 42, or any other applicable funding recertification paperwork and process. With this in mind, GPM will provide any lease violations to Resident Services for review. A Case Manager can then discuss the violation with the resident and assist them with understanding what they need to do to become lease compliant. If the resident refuses to be compliant or has continued offences, the Case Manager will then check in with the resident and begin conversation about upcoming changes coming to their housing and to make an eviction prevention or alternate housing plan.

Resident maintenance issues: GPM will develop resource guides to assist residents with common items within their unit, i.e. thermostat and appliances as these items will be new to the resident and it can be overwhelming to learn how to operate them. When a resident is moved to their new unit, GPM will walk through the unit demonstrating the use of these common items. This information will also be shared with Resident Services so they can assist with any follow-up issues and concerns the residents have with these items. Care Coordinators can determine if the resident is struggling with communication and the information may need to be communicated differently so they can absorb it. GPM will track work orders by unit and alert Resident Services if there are continual work orders for the same unit if they may need additional services. GPM will also track commonality of work orders so if there are a lot of work orders for the same thing, it can be incorporated into an education class for residents as a larger group. Maintenance staff also reports any housekeeping concerns in apartments that they have serviced to Property Manager and the Care Coordinator.

Upcoming housekeeping inspections and review of past housekeeping inspections: GPM will conduct unit inspections regularly and note housekeeping concerns or lease violations within a unit. This information will be communicated to Resident Services who will discuss previous and current housekeeping inspections that were failed and/or residents that need assistance with housekeeping. Care Coordinators will be invited to attend unit inspections so they may immediately communicate housekeeping concerns with the resident in the unit and determine if additional services are needed to address the housekeeping needs. Regular education classes will be held for all residents on the topic of housekeeping.

Upcoming events: Ensuring that all residents feel connected to not only their apartment community, but the larger community in which they live is key in residents maintaining a stable home. Events happening in the building, neighborhood, and community will be communicated to residents, via the 1501 Express weekly newsletter and postings throughout the building so they may engage in activities they are interested in. If residents have a service need to allow them to participate in these types of events, such as transportation, Resident Services will connect the resident with the services available.

Resident behavioral events and/or cognitive barriers: Many residents do not use the online portal to pay rent. It is often due to not understanding how to use a computer or being intimidated of creating an online account. GPM will ensure Resident Services is aware of these residents in order to provide any services

that would assist them in doing so. If a resident is in need of a reasonable accommodation to do so, paying in the office can provide a face-to-face interaction with GPM staff. If the staff recognizes behavioral or cognitive problems that are barriers to living independently, the Property Manager will inform Resident Services.

Property incidents: GPM encourages regular interactions with public safety, police and fire departments to create a strong working relationship. Additionally, we invite Police and Fire to regular resident meetings to educate residents on personal safety and fire prevention and how to be safe in their community. Property Management will obtain police reports regularly to stay aware of property incidents. Some incidents may be cause for immediate eviction such as violent crimes against another. Those charges are not eligible for an informal hearing process and the resident will be immediately processed for eviction. Resident Services will be made immediately aware of these situations so they may start communication with the resident about their future housing options. All other incidents are reviewed by Property Management and Resident Services for appropriate communication with the residents involved and determine best course of action to prevent further incidents and subsequent eviction. Resident Services will solicit resources to assist with the need area including but not limited to intimate partner violence intervention and Violence Against Women Act resources, connection to adult protective services, substance misuse treatment, or anger management services. Property Manager will keep a log of all incidents. The log will track the nature of the incident, description of the incident, date the incident occurred, and actions to be taken to avoid similar incidents in the future. The log will be reviewed in the monthly meetings with Resident Services.

Hospitalizations/Deaths: Reports are drawn from residents, announcements from partner case management, Tucson Police Department and family members. In cases of hospitalization, the Resident Services team can serve as a liaison to ensure that adequate care is provided to the resident to support independent living and recovery.

“High Traffic” concerns are noted during weekly team meetings with Property Management and Resident Services. Property Management will continue to evaluate and address areas that are unsafe for the community in order to prevent violence or crime. In cases where there is significant concern, Property Management will coordinate with Tucson Police Department to address the concern and Resident Services to offer resources to those affected.

## **VI. Sustainability**

The CNI Grant will allow HCD to establish a Resident Services team under the PHA that will provide relationship-based, trauma-informed, wraparound case management to target residents. HCD intends to use the remaining 8 years of the grant period to explore and layer in additional sources of funding which will not only extend services available to Tucson House residents, but also offer services to additional HUD-assisted residents. Opportunities include:

- City human services funding: In addition to being the PHA, HCD administers Community Development Block Grant and City General Fund Human Services allocations each year. In the first few years of the Choice grant, HCD intends to include extra points during its grant-making process for applications that provide services that benefit Tucson House and Thrive in the 05 residents. Over the grant term, HCD will evaluate the need and feasibility to continue those preferences.
- City sales tax or bond funds: The City may consider including funding for resident services in future sales tax or bond proposals to Tucson voters.

- Billing for services: HCD will explore consultation with experts in billing Medicare/Medicaid for certain services.
- Establishing a non-profit arm: To better facilitate fundraising, donations, and grants, HCD will explore creating a resident services non-profit.

Additionally, HCD envisions the PHA's ROSS and FSS programs to be housed under the Resident Services division in the long term. The Resident Services Manager will oversee multiple overlapping programs to sustain support to Tucson's HUD-assisted residents.

To better formalize these partnerships, HCD will establish standard practices for MOUs and data sharing agreements with supportive services partners over the coming year. MOUs will detail the specific commitment of services made to HCD including leverage funds and will also lay out expectations for reporting and referral procedures.

A few years prior to the end of the CNI grant in 2031, HCD will begin to assess the need for a Supportive Services Endowment, either using CNI funds or City general fund leverage for supportive services, based upon current and planned People services, activity, and expenditures at that time.

**VII. Annual Goals**

*Table 5: Annual Goals*

<b>METRIC</b>	<b>Source</b>	<b>Baseline 2023</b>	<b>Year 1 2024</b>	<b>Year 2 2025</b>	<b>Year 3 2026</b>	<b>Year 4 2027</b>	<b>Year 5 2028</b>	<b>Year 6 2029</b>	<b>Year 7 2030</b>	<b>Year 8 2031</b>
Number and percentage of target residents between the ages of 18-64 with wage income	Admin Data	11% 25/231	12% 28/231	13% 30/231	15% 35/231	17% 39/231	19% 44/231	21% 49/231	23% 53/231	25% 58/231
Average annual income of working age, non-disabled households	Admin Data	\$3,670 N=57	\$4,000	\$6,000	\$8,000	\$10,000	\$12,000	\$14,000	\$15,000	\$15,000
Average annual income of all target households	Admin Data	\$11,157	\$12,000	\$13,000	\$14,000	\$15,000	\$16,000	\$17,000	\$18,000	\$18,000
Number and percentage of households with income (wage or benefits)	Admin Data	82% 303/369	84% 310/369	87% 321/369	90% 332/369	93% 343/369	96% 354/369	99% 365/369	100% 369/369	100% 369/369
Number and percentage of target residents who have a place of healthcare where they regularly go, other than an emergency room, when they are sick or need advice about their health	Annual Needs Assessment	87% 234/268	88% 236/268	89% 239/268	90% 241/268	91% 244/268	92% 247/268	93% 249/268	94% 252/268	95% 255/268

Number and percentage of target residents who have health insurance	Annual Needs Assessment	96% 258/268	96% 258/268	97% 260/268	97% 260/268	98% 263/268	98% 263/268	99% 265/268	99% 265/268	100% 268/268
Number and percentage of target resident children, from birth to kindergarten entry, participating in center-based or formal home-based early learning settings or programs	Annual Needs Assessment	0% 0/3	33% 1/3	67% 2/3	100% 3/3	100% 3/3	100% 3/3	100% 3/3	100% 3/3	100% 3/3
Number and percentage of target resident children in kindergarten who demonstrate at the beginning of the program or school year age-appropriate functioning across multiple domains of early learning as determined using developmentally appropriate early learning measures <sup>1</sup>	Schools	N/A 0/0	TBD							
Number and percentage of target resident students at or above grade level according to State mathematics assessments in at least the grades required by the Elementary and Secondary Education Act (ESEA) (3rd through 8th and once in high school)	Schools	TBD								

<sup>1</sup> Education metrics will be updated once individual FERPA releases are signed and data is received from schools.

Number and percentage of target resident students at or above grade level according to State English language arts assessments in at least the grades required by the Elementary and Secondary Education Act (ESEA) (3rd through 8th and once in high school)	Schools	TBD								
Number and percentage of target resident students who graduate from high school on time	Schools	TBD								

**FY2022 HUD CHOICE NEIGHBORHOODS IMPLEMENTATION GRANT  
MEMORANDUM OF UNDERSTANDING FOR DATA COLLECTION, SHARING,  
AND USE FOR SERVICE COORDINATION AND ANNUAL RESIDENT NEEDS  
ASSESSMENT SURVEY FOR CNI GRANT REPORTING**

This Memorandum of Understanding (“MOU” or “Agreement”) is made and entered into effective on the first day of October 2025, by and between the City of Tucson (“City”), and Pima County Health Department (Agency) and (hereinafter individually referred to as a “Party” and collectively referred to as “Parties”).

**I. PURPOSE**

This MOU is entered into pursuant to the award of a \$50 million FY 2022 Choice Neighborhoods Implementation Program (“CNI Program”) Grant (“Grant” or “CNI Grant”) for the Thrive in the 05 Transformation Plan (“Thrive Plan”), awarded to the City of Tucson by the U.S. Department of Housing and Urban Development (“HUD”). The purpose of this MOU is to establish an agreement for data collection, sharing, and use for two critical aspects of the People Plan of the Thrive Plan: (1) social service coordination for qualified participants under the CNI Grant and Thrive Plan (including services categorized as service navigation, case management, relocation services, and other on-site services) and (2) Annual Resident Needs Assessment Survey reporting.

City, the Lead Agency and CNI Grantee, has also been identified as the People Lead for the Thrive Plan. Two of City’s responsibilities as People Lead will be (1) to work with service organizations to deliver on-site social services for those Residents residing in Tucson House as set forth in the Thrive Plan and (2) to coordinate and administer the required Annual Resident Needs Assessment Survey under the CNI Program (“Annual Resident Survey”). Parties agree to utilize the data solely for the purposes of service coordination, case management, and provision of social services as outlined and agreed upon for the CNI Grant, the Thrive Plan, and required CNI Grant reporting to HUD (which shall be inputted directly into the CN Inform System).

**II. TERM**

The term of this MOU shall commence on the 1<sup>st</sup> of July 2025 and shall expire on the 30<sup>th</sup> day of September 2031 or the close of the CNI Grant, whichever is later, unless terminated for convenience by any Party with a 30-day advance written notification without consequence, or immediately upon the occurrence of any of the following by a Party:

- Any material violation/non-compliance with the terms of this MOU by any Party
- Submission by any Party of falsified documents
- Bankruptcy or insolvency of a Party
- Loss of license or failure to comply with applicable statutes or regulations

Upon expiration or termination of this MOU, each Party, including its related or affiliated entities, promptly will return to the other Party all tangible property and documents, including proprietary documents, belonging to the other Party.

### **III. OBLIGATIONS OF PARTIES**

- A. City, as the Thrive Plan Lead Agency under the CNI Grant, will oversee grant implementation, data collection, provide administrative data regarding the Tucson House public housing site (“Tucson House”), and confirm residents as needed for Thrive Plan program purposes, and provide other requested information for CNI Grant reporting and fundraising purposes.
  
- B. Furthermore, City, as the Thrive Plan People Lead, will serve as the overall coordinator for the Annual Resident Survey, onsite service navigation, and case management services and will collect, monitor, and report services and activities per HUD guidelines and the Thrive Plan, and convene regular meetings with the other Service Providers (as defined below in Section V) for the purpose of coordinating efforts and creating a seamless experience for residents.
  
- C. Agency will provide information on residents served through their offered programs and services. This includes all information requested for CNI/Thrive Plan-reporting purposes which includes but is not limited to: name, address, phone number, services provided, and program referrals. In addition, Agency can also make referrals to City for case management, barrier removal requests, and other programmatic services. For case management services, Residents should also sign a Consent of Release of Information which would allow City and the respective service provider to coordinate efforts; however, the consent is not needed for the referral. At minimum, verbal consent for the referral is needed.
  
- D. Revival Development Services (“RDS”), as the current Housing Relocation Consultant contracted by Gorman and Company, will report on Residents served as part of the relocation process. This includes all information requested for CNI reporting purposes which includes but is not limited to: name, address, phone number, and program referrals. In addition, RDS will make referrals to City for case management and service needs/recommendations under the Thrive Plan. For case management services under CNI, Residents should sign a Consent of Release of Information, which would allow City and the respective service provider to coordinate efforts; however, the consent is not needed for the referral. At minimum, verbal consent for the referral is needed.
  
- E. The Parties acknowledge that no financial relationship is created between them by this

MOU. Neither party is the agent, employee, partner, joint-venturer, or associate of the other. No employee or agent of one party will be deemed or construed to be the employee or agent of the other party for any purpose.

#### **IV. PERSONALLY IDENTIFIABLE INFORMATION AND SENSITIVE INFORMATION**

The Parties are bound by confidentiality and privacy standards for data collection that prohibit the ability of each Party to provide specific data that would lead to the potential identification of an individual respondent. Such data is more commonly referred to as “Personally Identifiable Information” or “PII” and means any information collected, stored, and/or disseminated in the performance of this MOU that permits the identity of an individual to be directly or indirectly inferred, including (i) any information that can be used to distinguish or trace an individual’s identity, such as name, social security number, date and place of birth, mother’s maiden name, or biometric records; and (ii) any other information that is linked or linkable to an individual, such as medical, educational, financial, and employment information. Examples of PII include, but are not limited to:

- Name, such as full name, maiden name, mother’s maiden name, or alias
- Personal identification number, such as social security number (SSN), passport number, driver’s license number, taxpayer identification number, or financial account or credit card number
- Address information, such as street address or email address
- Personal characteristics, including photographic images (especially of face or other identifying characteristic)

“Sensitive Information” means any information (not including PII) of which the loss, misuse, or unauthorized access to or modification of which could adversely affect the interest or the conduct of City’s programs, or the privacy to which individuals are entitled under state and federal privacy laws and regulations.

All PII, Sensitive Information, as well as any other identified data contained in City, HUD, or Agency datasets, paper case files, and information provided in any form to Agency either by City or Resident participants will be held confidential and maintained in accordance with this Agreement. Agency shall also comply with all applicable state and federal statutes and regulations governing the gathering, use and protection of such data, including but not limited to the Federal Privacy Act of 1974, 5 U.S.C. 552 (“Privacy Act”) and all relevant HUD requirements.

#### **V. DATA TO BE SHARED FOR SOCIAL SERVICES COORDINATION**

Social Services Providers including the Agency (hereinafter collectively referred to as “Service Providers”) will exchange and coordinate data amongst each other, and with City only with express consent from each Resident, to provide service navigation and case management activities at Tucson House.

After obtaining consent from the Residents pursuant to Section IX, below, Service Providers will share the following data elements, which may include PII, from their respective service records

for the coordination of activities and reporting purposes per HUD requirements under the CNI Program and/or as otherwise collectively agreed-upon data metrics aligned with goals for the CNI Grant including but not limited to the items listed below.

- Name, First and Last
- Date of Birth
- Address
- Phone Number
- Email Address
- Identified Gender
- Language
- Preferred Method of Contact
- Race/Ethnicity
- School/Job Training Enrollment
- Family Type
- Employment Status
- Income Sources
- Service Interest
- Referrals Requested/Made

All data collected, accessed, used, or maintained by Service Providers about any or all members of Tucson House resident households (collectively, “Resident Households”) under this MOU shall be additionally referred to as the “Subject Data.”

Service Providers will provide the Subject Data through a secure communication channel such as a Secure File Transfer Protocol (“SFTP”) or other approved method. The Subject Data will be transferred in an encrypted format for storage on a secured server with password protection. Once moved to a secured server, the data will be deleted from the online platform.

## **VI. CONFIDENTIALITY**

The Parties are bound by federal and state confidentiality and privacy laws and standards for data collection that prohibit Parties’ ability to provide specific data that would lead to the potential identification of an individual respondent unless required by law. Each Party agrees that, at all times during and after performance under this MOU, it will maintain all information received in strict confidence and will not use such information for purposes other than intended by this MOU. The Parties are prohibited from disclosing this information to persons other than in the performance of their duties under this MOU unless required to do so by law or regulation and are required to destroy the information after its stated need has been fulfilled.

## **VII. USE OF DATA**

Service Providers agree to utilize the Subject Data solely for the purposes of service coordination, case management, and provision of social services as outlined and agreed upon for the CNI Grant. Any other use of the Subject Data, PII, or any other similar data is strictly prohibited, except as

otherwise consented to by participating Resident Households. Any data usage not covered in this MOU is strictly prohibited.

Parties agree not to share, license, re-license, sub-license, assign, release, publish, transfer, sell, or otherwise make available any portion of the data received under this MOU with any other entity or person except as provided by the terms of this MOU.

## **VIII. MAINTENANCE AND SECURITY OF DATA**

A. All information and materials, including PII, provided to, collected by, used by, or maintained by any of the Parties in furtherance of or connection with this Agreement, as applicable, are confidential, shall be safeguarded by the Parties, and shall not be disclosed to any employees, agents, contractors, or other persons or entities without the prior written approval of City. All information and material provided under this MOU shall only be disclosed as permitted in writing by City or as required by law.

B. Access to the Subject Data will be allowed only as necessary for Service Providers to perform service navigation and outreach for services, onsite case management, and services to the Tucson House community, as required under the terms of the CNI Grant.

C. Each Party shall comply with all applicable state and federal laws governing the gathering, use, and protection of PII and Sensitive Information, including the Privacy Act. Access to the Subject Data shall be solely for the purposes outlined in this Agreement.

D. Service Providers acknowledge that the personal information was compiled for City's administration of its public housing program, and Service Providers will comply with all public housing requirements and restrictions related to the Subject Data.

E. Each Party agrees that access to PII and Sensitive Information shared or collected under this Agreement is maintained in a location that is limited to authorized users and is controlled by password protection. The Parties shall maintain all printouts, CD-ROMS, or other physical products containing PII or Sensitive Information derived from the data shared or collected under this Agreement in locked cabinets, file drawers, or other secure locations when not in use. The Parties shall establish security protections to ensure that the data shared or collected under this Agreement cannot be used or taken by unauthorized individuals or entities.

F. Service Providers shall ensure that access to the Subject Data maintained in computer memory is controlled by password protection. Service Providers shall maintain all printouts, CD-ROMS, or other physical products containing personally identifiable information derived from the Subject Data in locked cabinets, file drawers, or other secure locations when not in use.

G. The Service Providers shall not permit removal of any Subject Data from the limited access space protected under the provisions of this MOU.

H. PII and Sensitive Information shall be retained only for the period of time required to use it for the purposes stated in the MOU and any applicable retention periods. Thereafter, unless otherwise directed by City, all PII and Sensitive Information maintained by Service Providers electronically, in hardcopy, or otherwise, shall be destroyed using appropriate destruction methods.

I. Service Providers shall notify City of any breach or suspected breach of its data storage or unauthorized release of data shared or collected under this Agreement, including PII and Sensitive Data, within 24 hours of discovery.

J. Service Providers shall each report to City in a prompt and complete manner any of their related security breaches involving PII.

K. Service Providers hereby agree to mitigate any harmful effect on City of any use or disclosure of PII by them, or their respective employees or agents or, in violation of the requirements of this MOU.

L. Each party (as Indemnitor) agrees to indemnify, defend and hold harmless the other party (as Indemnitee) from and against any and all claims, losses, liability, costs or expenses (including reasonable attorney's fees) (hereinafter collectively referred to as "claims") for bodily injury of any person (including death) or property damage, but only to the extent that such injury or damage is caused or alleged to be caused by a negligent or intentionally wrongful act or omission of the Indemnitor, or of any of its officers, officials, agents, employees, or volunteers.

M. Any violation of the terms and conditions of this MOU may subject the Service Providers to immediate revocation of the Agreement by City. Any person who knowingly or willfully requests or obtains any record concerning an individual from an agency under false pretenses shall be subject to criminal penalties under the Privacy Act and may be subject to prosecution under other statutes such as 18 U.S.C. § 494, § 495, and § 1001. In the event of improper use or disclosure of the Subject Data, the Data Recipient agrees to report the incident immediately to City and to cooperate fully with City. Waiting over 24 hours after learning of an improper disclosure to report to City shall be considered a violation of this MOU. Further, any violation of this MOU may also be a violation of Federal criminal law under the Privacy Act. The penalty for violation of the Privacy Act is a fine of not more than \$5,000.

## **IX. RESIDENT CONSENT FORMS**

Parties contacting Tucson House households for assessment for and participation in social services under the CNI Grant and participation in the Annual Household Survey shall secure Resident's and Resident Household member's(s') written or verbal consent prior to collecting any information or data. Said prior consent shall clearly include notice to the Resident participants, and acknowledgment by the Resident participants, of the following:

- Resident participation is entirely voluntary;

- All information provided by participants shall remain confidential and limited in its use to the purposes outlined in this MOU, unless express written consent is obtained from participants to use the information for another purpose;
- The limitations on the use of Resident data collected;
- All resident information provided shall be protected in accordance with the requirements of this MOU, any internal data protection protocols (if any), and the Federal Privacy Act of 1974, 5 U.S.C. 552 (the "Privacy Act"), and all implementing regulations and directives of the United States Department of Housing and Urban Development, as well as relevant Arizona privacy protections; and
- Resident participation in the services and programs offered or decision to stop participating in the services and programs shall in no way affect the resident's eligibility for public benefits.

## **X. REPORTING RESPONSIBILITIES**

Parties understand the importance of providing HUD timely and complete information as required under the CNI Program, and is supportive of assisting City in gathering such information as is requested by HUD or otherwise needed to support the Thrive Plan, and agrees to provide the requested reports within the agreed-upon timeline and in accordance with the requirements of the CNI Program.

### **A. Monthly and Quarterly Reporting**

Agency shall complete quarterly reporting including the Subrecipient Agreement/MOU Exhibit B – Performance report by the due date assigned in the Subrecipient Agreement/MOU. Reporting shall include a quantification of services provided and unduplicated list of service participants.

Each Party shall maintain copies of their respective completed quarterly reports and the back-up documentation that supports such reports for at least five years following termination of this MOU and/or the close out of the CNI Grant, whichever is later.

### **B. Annual Resident Survey**

Data collection for the Annual Resident Survey is targeted to take place during the of August through December each year of this MOU. The target period for completion of the Annual Resident Survey is January through March of the following year. All Parties will receive a final copy of the Annual Resident Survey findings.

## **XI. NOTICES AND DESIGNATED CONTACTS**

- A. All notices contemplated or required under this MOU, including a Notice of Termination, shall not be deemed given unless dispatched by registered or certified mail, postage prepaid, return receipt requested, or delivered personally to the principal offices of the Parties as follows:

**City:** Ann Chanecka, Director  
City of Tucson Housing and Community Development Department  
310 N Commerce Park Loop  
Tucson, AZ 85745  
Ann.Chanecka@tucsonaz.gov

**Agency:** Dorothee Harmon, Division Manager  
Pima County Health Department  
97 E. Congress  
Tucson, AZ 85701  
Dorothee.Harmon@pima.gov

- B. To facilitate successful administration of this MOU, each Party has a Designated Contact who will act as the contract person for such Party regarding this MOU, for purposes of providing data and observing the security and privacy arrangement specified herein. Any party may change its Designated Contact by notifying each of the other Parties in writing of such change. Any such change will become effective upon receipt of such notice by each of the other Parties to the MOU.

**City:** Rachel Briggs, Grant Coordinator  
City of Tucson Housing and Community Development Department  
310 N. Commerce Park Loop  
Tucson, AZ 85745

**Agency:** Dorothee Harmon, Division Manager  
Pima County Health Department  
97 E. Congress  
Tucson, AZ 85701  
Dorothee.Harmon@pima.gov

## **XII. CONFLICT OF INTEREST**

Parties agree to report any potential or actual conflicts of interest that may interfere with the duties, responsibilities, or obligations under this MOU.

## **XIII. AMENDMENT**

No amendment or variation of the terms of this MOU shall be valid unless made in writing, signed by the Parties, and approved as required.

## **XIV. STATEMENT OF INTENT**

This MOU is not intended to be a legally enforceable contract. It is, rather, a statement of the parties' mutual understanding and agreement regarding data collection, sharing, and use for the People Plan of the Thrive Plan.

**XV. MISCELLANEOUS**

A. This Agreement, including all exhibits and other documents incorporated herein or made applicable by reference, sets forth the entire agreement between the Parties with respect to the data referred to herein, superseding all prior agreements and understandings, either written or oral, and may not be altered or modified except through the mutual written consent of the Parties.

B. This Agreement may be executed in as many counterparts as may be deemed necessary and convenient, and by the different parties hereto on separate counterparts, each of which, when so executed, shall be deemed an original, but all such counterparts shall constitute one and the same instrument.

C. The Parties do not intend the benefits of this MOU to inure to any third party, nor shall any of this MOU be so construed. This Agreement shall not be construed as creating a right in any third party to enforce any provision set forth herein, or to assert any claims against the Parties.

D. No Party may assign any of its rights or duties under this MOU without the express written consent of the other Parties. The Parties and each of them represent and warranty that they have not heretofore assigned to any other persons or entity claims, rights or obligations to be performed as a term of this MOU nor any claims or rights released or discharged.

E. Each of the signatories hereto warranties and represents that he or she is competent and authorized to enter into this MOU on behalf of the Party for whom he or she purports to sign.

**City:**

January 15, 2026

By: \_\_\_\_\_

Ann Chanecka

Name:

Title: Director - Housing and Community Development

**Agency:**

By: \_\_\_\_\_

Name:

Title: