



A home is the starting place of hope and dreams...

September 22, 2020

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Kim Frazier

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

RE: Rental Assistance Program Administrator for CDBG COVID-19 Costa Mesa  
Rental Assistance Program RFP

To Whom It May Concern:

Serving People In Need (dba SPIN) is pleased to submit a proposal to implement and administer \$207,000 for 30 eligible households with children for rental assistance, program compliance services and case management services from the Community Development Block Grant (CDBG) COVID-19 Costa Mesa Rental Assistance Program. As a 501(c)(3) local nonprofit with more than 5 years' experience in administering CDBG rental assistance programs and with an office located within a five mile radius of the City of Costa Mesa, SPIN is well-qualified to mitigate and assist qualified low-income residents of Costa Mesa to maintain their housing stability and assist with overcoming the impact of COVID-19 on their housing, income, employment, etc.

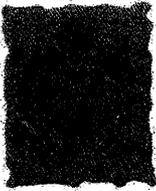
SPIN has been active with the City of Costa Mesa in numerous ways since the early 1990's. SPIN was selected approximately 15 years ago to run the City of Costa Mesa's Tenant Based Rental Assistance Program, received CDBG funding for our Substance Abuse Program (SARP) and the Guided Assistance to Permanent Placement Housing Program (GAPP) for homeless and low-income families. SPIN was also selected to serve on the citizen's committee to determine the definition of a Costa Mesa "resident" and to address homeless issues within the City of Costa Mesa. Currently, we are a member of Costa Mesa's Network for Homeless Solutions. In addition, SPIN, based in Costa Mesa, is the Access Point for homeless families with children in Central Orange County and, as such, provides diversion, prevention and access to housing to families.

If recommended for funding, SPIN will provide outreach and information regarding the availability of the Program in coordination with the City of Costa Mesa, as the housing partner at the Melinda Hoag Smith Center for Healthy Living, with its partners in the

151 Kaimus, H-2 • Costa Mesa, CA 92626 • TELEPHONE (714) 751-1101 • FAX (714) 751-3332 • www.spinoc.org • Tax I.D. #33-0329687

"Restoring Orange County's homeless families and individuals in crisis to housing and permanent self-sufficiency through SPIN's long-term, proven case management and support services"





# SPIN

SERVING PEOPLE IN NEED

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**Robert M. Taylor**  
Pharmaceutical

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Kim Frazier

Family Solutions Collaborative, and with local churches and school representatives. Additionally, SPIN will post information about the Program on its website.

SPIN proposes to assist qualified residents of Costa Mesa who are experiencing a temporary setback due to COVID-19. SPIN will determine the eligibility of each applicant and complete intake documentation required by the Department of Housing and Urban Development (HUD) for CDBG COVID-19 funds. SPIN's staff is experienced in obtaining required documentation for rental assistance through its HUD funding and the HEAP rental assistance process. Staff will assess each applicant's eligibility and the amount of assistance required based on an individualized evaluation of the family's need. The Program Administrator will produce and develop program application forms, client surveys, any required reporting materials and information and provide a summary of all applicants/clients who were approved and received rental assistance including name and address, eligibility, income level, ethnicity and race, documentation of reason for financial loss and total rental assistance approved, as well as the number of month(s) of assistance. For those that were denied payment, SPIN will provide the name and address and the reason the rental assistance was denied.

If selected for funding, the Program will be managed from SPIN's main office located in the Coppertree Business Park at 151 Kalmus Drive, Suite H-2, Costa Mesa, CA 92626, phone number 714-751-1101.

Thank you for your consideration of our funding proposal.

Regards,

Jean H. Wegener  
CEO





**Serving People In Need, Inc.**

**RFP for Rental Assistance Administration for the City of Costa Mesa**

**Included in This Packet:**

**Background and Project Summary**

**Method of Approach**

**Appendix C Forms**

**Key Personnel Resumes**

**Serving People In Need, Inc.**  
**RFP for Rental Assistance Administration for the City of Costa Mesa**

**Background and Project Summary:**

SPIN has been based in Costa Mesa for nineteen years and, as such, has worked with the City to define its definition of a Costa Mesa resident, sought and been awarded grants for its Substance Abuse program and its GAPP housing program, was selected to run its Tenant Based Assistance Program in the 1990's and currently sits on Costa Mesa's Network for Homeless Solutions committee. SPIN is also the Access Point for homeless families in Central Orange County and serving in this capacity, it has enabled SPIN to observe the growing number of homeless families in this area, especially from Costa Mesa, who are seeking rental assistance. This increase is mainly due to the impact COVID-19 on lives....loss of a job, reduced wages due to reduced hours, closure of a business, etc.

SPIN case management staff is knowledgeable and possesses experience in collecting the necessary documentation to provide rental assistance due to its experience with providing such documentation for CDBG grants and HEAP funding for rental assistance. **SPIN Program staff will be responsible for:**

- Provide assistance to families with children who are applying for rental assistance who reside in the City of Costa Mesa, determine eligibility and if eligibility requirements are met, move the family forward through the intake, application and documentation process required by HUD for CDBG-CV funds.
- In coordination with the City, notify relevant entities such as other nonprofits, churches, schools, the Melinda Hoag Smith Resource Center, etc. of information on the program and the availability of these funds to benefit eligible families.
- Develop, prepare, distribute and process applicant's forms, surveys and reporting materials.
- Assess the amount of assistance needed by the applicant based on the family's financial need.
- Distribution of rental assistance payments directly to the landlord/owner up to a maximum amount of \$6,000 per household or up to 3 months' rent, partial or full rent, whichever amount may be less.
- Validation of the lease or rental agreement between the landlord and the tenant.
- Obtain a landlord/property owner affidavit confirming the program's terms.
- Send letters/notifications to applicants confirming or denying their grant payment.

In addition, all program applications must include the following:

- The household size and income of the applicant
- The most recent rental payment made immediately preceding March 31, 2020.
- Documentation of the need for assistance from the program

- Proof of loss of or reduction of income due to COVID-19
- Self-certification under penalty of perjury from the property owner/landlord and tenant that they are not receiving any other form of rental assistance or subsidy.

**SPIN's Program Administrator** will submit quarterly reports on the progress of program objectives as noted in the Scope of Work. Quarterly reports and reimbursement requests will be submitted to the City of Costa Mesa on the 15<sup>th</sup> of the month following the close of each quarter. Quarter ending dates are on 9/30, 12/31, 3/31 & 6/30. Invoices for services provided by SPIN for the City of Costa Mesa will also be provided quarterly and will include all back-up documentation for any costs submitted for reimbursement. The program administrator will be responsible for ensuring each client file is closed in compliance with program guidelines and that all program files are stored in accordance with federal recordkeeping rules and regulations.

SPIN will implement this Program upon notice of an award of funds. Program case managers are already familiar with the documentation required of all recipients of rental assistance, but the Program Administrator will review those requirements again with the staff.

SPIN will seek client input regarding their needs (rental assistance, other resources, etc.) during the period of time they are receiving rental assistance and log those interactions and referrals. Clients will also have access to SPIN's food pantry. All clients will be encouraged to contact SPIN again should their needs continue and SPIN staff will try to find other resources to assist them through our partnerships in the community. At the conclusion of their time with SPIN, clients will be asked to complete a survey regarding the assistance received from SPIN and their satisfaction with those services. The surveys will be included in their file or, if they wish to remain anonymous, kept together in a separate file. If clients are referred to SPIN from other sources, i.e. churches, the school district, etc., SPIN will also seek their input re satisfaction with the services provided by SPIN.

**Serving People In Need, Inc.**  
**RFP for Rental Assistance Administration for the City of Costa Mesa**

**Method of Approach:** At award of funds, SPIN will begin implementing the following:

- 1) Notify churches, schools, Melinda Hoag Smith Center, the Family Solutions Collaborative etc. of the availability of funds for rental assistance for Costa Mesa residents.
- 2) Case managers and housing navigator begin accepting applications for rental assistance and collecting required back-up documentation.
- 3) When all documentation are received, client is approved and/or denied to the program and client is notified of the decision and amount and length of assistance is determined, maximum \$6,000 per household or actual rent for a maximum of 3 months whichever is less, if applicable.
- 4) Case manager will issue request to program administrator for rental assistance. Program administrator will verify documentation, issue a check directly to the landlord, and maintain appropriate copies of documents for quarterly reimbursement request to the City.
- 5) Staff will offer the applicant access to SPIN's food pantry and provide resources for companies that are hiring, counseling and other support services.
- 6) These efforts will continue until funds are expended, all client follow up's are completed and client files are closed and retained and stored in accordance with federal recordkeeping rules and regulations.

## COMPANY PROFILE & REFERENCES

**Company Legal Name:** Serving People In Need, Inc. dba SPIN

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

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

**Business Address:** 151 Kalmus Drive, Suite H-2, Costa Mesa, CA 92626

**Website Address:** www.spinoc.org

**Telephone Number:** 714-751-1101

**Facsimile Number:** 714-751-3332

**Email Address:** info@spinoc.org

**Length of time the firm has been in business:** 31 years

**Length of time at current location:** Since June 2001 or 19 years

**Is your firm a sole proprietorship doing business under a different name:** \_\_\_Yes XNo

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

**Federal Taxpayer ID Number:** 33-0329687

**Regular Business Hours:** Monday - Thursday, 8:30 AM - 5 PM, Fridays: 8:30 AM - 3 PM

**Regular holidays and hours when business is closed:** July 4th, Memorial Day, Labor Day, Thanksgiving, Christmas Eve, New Year's Day

**Contact person in reference to this solicitation:** Jean Wegener

**Telephone Number:** 714-751-1101, ext. 12 **Facsimile Number:** 714-751-3332

**Email Address:** jeanw@spinoc.org

**Contact person for accounts payable:** Stephanie Smolkin

**Telephone Number:** 714-751-1101, ext. 21 **Facsimile Number:** 714-751-3332

**Email Address:** accounting@spinoc.org

**Name of Project Manager:** Stephanie Smolkin

**Telephone Number:** 714-751-1101, ext. 21 **Facsimile Number:** 714-751-3332

**Email Address:** accounting@spinoc.org

## **COMPANY PROFILE & REFERENCES (Continued)**

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

**Company Name:** U.S. Housing & Urban Development

**Contact Name:** Cynthia Blatt

**Contract Amount:** \$544,346

**Email:** cynthia.j.blatt@hud.gov

**Address:** Office of Community Planning & Development, 300 N. Los Angeles St., Suite 4054,  
Los Angeles, CA 90012

**Brief Contract Description:** Provide move-in costs to housing, rental assistance, case management and support services for 35 homeless families with children.

**Company Name:** Marisla Foundation

**Telephone Number:** 800-839-5316

**Contact Name:** Peggy Lauer

**Contract Amount:** \$50,000

**Email:** peggy@marisla.org

**Address:** 668 North Coast Highway, Laguna Beach, CA 92651

**Brief Contract Description:** To provide housing in Orange County to 15 low-income or homeless headed households and their children and to provide case management support services.

**Company Name:** Croul Family Foundation

**Telephone Number:** 877-968-6328

**Contact Name:** Sara Garske

**Contract Amount:** \$25,000

**Email:** sgarske@ff-inc.com

**Address:** 18101 Von Karman Avenue, Suite 750, Irvine, CA 92612-0145

**Brief Contract Description:** To provide housing in Orange County for homeless families and case management and support services.

**Company Name:** Orange County Community Foundation

**Telephone Number:** 949-553-4202, ext. 248

**Contact Name:** Austin Muckenthaler

**Contract Amount:** \$25,000

**Email:** amuckenthaler@oc-cf.org

**Address:** 4041 MacArthur Blvd., #510, Newport Beach, CA 92660

**Brief Contract Description:** Margaret E. Oser Grant for women headed household and their children, providing housing support services and case management.

**Company Name:** Hoag Hospital Community Benefit Programs

**Telephone Number:** 949-764-6959

**Contact Name:** Lauren Tabios

**Contract Amount:** \$50,000

**Email:** Lauren.Tabious@hoag.org

**Address:** Hoag Memorial Hospital, 1 Hoag Drive, Newport Beach, CA 92658

**Brief Contract Description:** Funds to house homeless families with children and provide case management and support services.

**Names & Titles of Corporate Board Members**

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

Names	Title	Phone
Charlie Granville	Chairman of the Board	949-295-5741
Al DeGrassi	Vice-Chairman	714-342-0690
Maureen Flanagan	Treasurer	949-255-2740
Rachel Owens	Secretary	714-560-9022
Joy Brenner	Director	949-200-9993
Richard Crawford	Director	714-545-0904
Mary Lou Shattuck	Director	714-960-9276
Kate Domagala	Director	949-382-5167
Curtis Scheetz	Director	562-895-6201
Melphine Evans	Director	949-218-2808
Michael Gilmore	Director	714-777-8600
Joyce Takeda Wakefield	Director	714-384-4510
Joe Heffington	Director	949-252-2041
Jean Wegener	CEO	714-751-1101
Jacqueline Luther	Director	714-424-2813

Federal Tax Identification Number: 33-0329687

City of Costa Mesa Business License Number: 06974

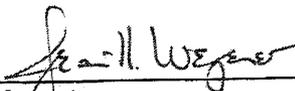
(If none, you must obtain a Costa Mesa Business License upon award of contract.)

City of Costa Mesa Business License Expiration Date: May 31,2021

**EX PARTE COMMUNICATIONS CERTIFICATION**

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

I certify that Proposer and Proposer's representatives have not had any communication with a City Councilmember concerning informal **RFP No. 21-02 FOR Rental Assistance Program Administrator** at any time after **September 9, 2020**.

  
\_\_\_\_\_

**Signature**

**Date:** September 22, 2020

Jean Wegener

**Print**

**OR**

I certify that Proposer or Proposer's representatives have communicated after **September 9, 2020** with a City Councilmember concerning informal **RFP No. 21-02 FOR Rental Assistance Program Administrator**. A copy of all such communications is attached to this form for public distribution.

\_\_\_\_\_  
**Signature**

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

\_\_\_\_\_  
**Print**

## DISCLOSURE OF GOVERNMENT POSITIONS

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

Joy Brenner, City Council, City of Newport Beach.....SPIN Board of Directors

## DISQUALIFICATION QUESTIONNAIRE

The Contractor shall complete the following questionnaire:

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

Yes \_\_\_\_\_ No X

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



**Key  
Personnel**

# Stephanie K. Smolkin

☎: (714) 749-7512

✉: [accounting@spinoc.org](mailto:accounting@spinoc.org)

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## EDUCATION

California State University Long Beach  
**Bachelor of Science in Business Administration**  
May 1994

## CERTIFICATIONS

- Tax Preparer's Certificate

## SKILLS

- Finance and accounting management for non-profit and for-profit businesses
- Budget preparation and implementation
- Non-profit accounting and tax policies, procedures and implementation
- Government and private grant administration for grantee
- Non-profit Program administration
- Advanced computer skills including Excel, Word, and QuickBooks Pro for individuals, for-profit and non-profit businesses

## EXPERIENCE

**Controller & Grant Administrator**, SPIN (Serving People in Need), Costa Mesa, CA

July 2012 - Current

- Oversee and administer accounting and financial functions for Organization and Programs
- Prepare and implement Organization and Program budgets
- Prepare and distribute monthly financial statements to Organization management and the Board of Directors
- Administer and track grant processes and expenditures
- Prepare and analyze data for Program management and grant reporting
- Prepare documentation for grant reimbursement request, as applicable
- Represent the Organization at County of Orange and other meetings
- Maintain current knowledge of funding sources regulations and requirements
- Formulate Organization and Program policies and procedures in coordination with the Chief Executive Officer

**Accountant**, King's Harbor Church, 23915 Garnier St., Torrance, CA

July 2005 – July 2012

- Oversee and administer accounting and financial functions for Organization
- Prepare and implement Organization and Department budgets
- Prepare and distribute monthly financial statements to Organization management and the Governing Board

**Accountant**, John Pascoe CPA Accountancy Corporation, 2222 Martin, Ste. 220, Irvine, CA

September 1997 – July 2005

- Prepared non-profit, corporate and individual tax returns
- Reviewed client accounting records and prepare financial statements
- Client accounting and finance consultations

**Accountant**, Maxwell & Company CPA's, 16640 Bake Parkway #150, Irvine, CA

July 1994 – December 1997

- Prepared non-profit, corporate and individual tax returns
- Reviewed client accounting records and prepare financial statements

# Adreanna Solis

☎: (818) 792-0210

✉: asolis4224@gmail.com

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## EDUCATION

California Lutheran University; Thousand Oaks, CA  
**Bachelor of Arts Degree in Sociology**  
May 2014

California State University; Long Beach, CA  
**Master of Public Policy and Administration**  
May 2020

## CERTIFICATIONS

- Employer-Employee Relations and Personnel Management
- Mental Health First-Aid
- 40 Hour Domestic Violence Advocate

## HARD SKILLS

- Bilingual: English/Spanish
- Case Management
- Data Entry: HMIS, WS, Advocate

## SOFT SKILLS

- Communication
- Collaboration
- Critical Thinking

## EXPERIENCE

**Senior Case Manager**, Serving People in Need (SPIN), Costa Mesa, CA July 2020 - Current

- Develop and maintain landlord and community relationships
- Represent the organization at United Way, Family Solutions Collaborative, Family Resource Centers, City of Costa Mesa, and Coordinated Entry meetings
- Maintain current knowledge of various funding source regulations
- Create and update training materials for the purposes of onboarding new program staff
- Prepare and analyze data as needed for program management and reporting
- Formulate policies and procedures in coordination with administration

**Case Manager**, Serving People in Need (SPIN), Costa Mesa, CA June 2018 – July 2020

- Advocated for families with housing barriers to help secure permanent housing
- Educated participants on tenant/landlord relations and financial literacy
- Coordinated and conducted unit inspections before and during tenant residency to ensure safety
- Tracked client progress and achievements through case notes, data entry, and success stories
- Created client profiles, enrollments, and enter services using the Clarity database (HMIS)
- Referred clients to appropriate resources specific to their case

**Case Manager**, Laura's House, Ladera Ranch, CA June 2015 - June 2018

- Assessed physical, financial, emergency, medical, vocational, educational, and housing needs
- Formulated and implemented case management plans for emergency shelter participants
- Entered client and service provision data on the WS database for contracts and reports
- Upheld the confidentiality of clients, staff, volunteers, interns, and agency information
- Reported good cause, child and/or elder abuse to designated agencies as a mandated reporter
- Presented on safety planning and case management at the bi-annual 40-hour DV training

**Residential Counselor**, Rosemary Children's Services, Pasadena, CA July 2014 - October 2014

- Evaluated suicide ideation and risks for residents who displayed behaviors beyond their baseline
- Documented daily incidents in a timely manner to keep residential counselors informed

**Resident Assistant**, California Lutheran University, Thousand Oaks, CA May 2012 - May 2014

- Drafted program proposals requesting approval and endorsement to coordinate events
- Submitted program evaluations to report budget usage and event outcomes

## **Ladeshia Goubert**

102 West Avenida Gaviota C  
San Clemente, CA 92672

Cell (949) 573-3090  
[lsgoubert@hotmail.com](mailto:lsgoubert@hotmail.com)

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### **Areas of Specialty**

- Domestic Violence
- Substance Abuse
- Mental Illness
- Chronic Homeless
- Police Liaison
- Faith Community Collaboration

### **Certifications & Training**

- **40-Hour Domestic Violence Advocate Training** June 2014  
*Calif. Evidence Code 1037.1 for designation as Domestic Violence Counselor*
- **Mental Health First Aid Part 2 – Human Resources Level Training** June 2014  
OC Healthcare Agency Behavioral Health Services
- **The Gathering on Mental Health & the Church (8 hours)** March 2014  
Sponsored by Saddleback Church, Roman Catholic Diocese of Orange, and National Alliance on Mental Illness (NAMI)
- **Homeless Management Information System (HMIS) Training** Sept 2013
- **Detecting Early Warning Signs of Mental Illness Training** Feb 2013  
OC Healthcare Agency Behavioral Health Services
- **10-Hour Mental Health First Aid Workshop** Oct 2012  
OC Healthcare Agency Behavioral Health Services

### **Experience**

**CASE MANAGER, SPIN (Serving People in Need)** November 2014 - Present  
Works with homeless and very low-income families to provide permanent housing. Provides case management & resources to ensure successful long-term housing stability. Maintains client files & inputs data in the Homeless Management Information System (HMIS). Attends regular Coordinated Entry Housing (CES) meetings to represent SPIN in matching families to Guided Assistance to Permanent Placement (GAPP) program. Works with landlords & property managers to assist clients in obtaining housing & advocate for their approval.

**DIRECTOR OF SOCIAL SERVICES, iHOPEoc, Inc.** Sept 2013 – November 2014  
Developed programs, trained volunteer staff, provided case management oversight, and worked closely with major donors.

- **Homeless Liaison Officer Program** – Partner with police officers in Dana Point, San Clemente and San Juan Capistrano to provide homeless clients with immediate services

## **Ladeshia Goubert**

102 West Avenida Gaviota C  
San Clemente, CA 92672

Cell (949) 573-3090  
[lsgoubert@hotmail.com](mailto:lsgoubert@hotmail.com)

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(bus passes, I.D. & documentation, emergency hotel vouchers, etc.) to move them off the street.

- **Relocation Support Program** - Connect homeless clients to stable housing by reconnecting them with family or friends who have the means and willingness to support them. Provide weekly follow-up calls by the case manager for the first month
- 
- 
- **Self-Sufficiency Program** - Stabilize clients so they can overcome their immediate crisis and achieve their goal of self-sufficiency. Services include rental assistance, healthcare support, dental services, and transportation assistance.
- **Shower Services** - Provides a weekly shower to the homeless community of Dana Point and surrounding cities. The mobile shower service provides clean socks, underwear, T-shirts & basic personal items for an average of 100 clients per month.
- **Fund Development** - Develop personal relationships with major donors and speak to community groups and churches.

### **LEAD CASE MANAGER, iHOPEoc, Inc.**

May 2012 - Sept 2013

Developed new programs, trained volunteer staff and provided case management.

### **VOLUNTEER CASE MANAGER, iHOPEoc, Inc.**

Feb 2012 - May 2012

Provided case management services and assisted clients in obtaining dental services and other resources.

### **OUTREACH PROJECT COORDINATOR, Heritage Christian Church**

Oct 2010 - Dec 2012

Facilitated Christmas outreach project for working poor in Dana Point, San Clemente and San Juan Capistrano.

### **DENTAL/VISION OUTREACH PROGRAMS**

Jan 2009 - Present

Coordinate emergency dental services for homeless and working poor. I created and ran this program on my own initiative with no outside financial support. Worked with a dental group to coordinate an annual day of free dental services for 35-40 people throughout south Orange County.

### **COMMUNITY HOMELESS ADVOCATE**

2008 - Present

Helped homeless clients obtain documentation, dental services, and other resources. Held mini-fundraisers to move people off the streets and into housing. Coordinated funding from local churches to meet current client needs.

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# NATALIE ESTRADA

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## EDUCATION

CALIFORNIA STATE UNIVERSITY, FULLERTON, CA — B.A. IN SOCIOLOGY, EMPHASIS IN HEALTH AND SOCIAL WELFARE, MAY 2017

## SKILLS

Experienced Case Manager with a demonstrated history of working in the non-profit organization management industry. In-depth knowledge of and working with individuals and families with mental health disabilities, substance abuse disorders, low economic, child abuse, and criminal histories. Knowledge of Orange County Services. Problem-Solving, facilitation, and conflict resolution skills. Record keeping skills and ability to maintain accurate and confidential files. Ability to work individually and as part of a team. Bilingual in English and Spanish.

## RELATED EXPERIENCE

CASE MANAGER, SERVING PEOPLE IN NEED (SPIN), COSTA MESA, CA — APRIL 2019-PRESENT  
Provide individualized family support and intensive case management for homeless families in crisis. Assist families experiencing homelessness to secure housing by providing education and guidance regarding the housing search process. Complete apartment inspections to ensure their safety. Utilization of the Orange County Clarity database to enroll clients into programs, create client profile forms, and other data entry. Conduct monthly budgeting meetings with clients to track their financial progress, set-up client meetings for job development, counseling, etc. and refer to other needed services and resources.

VOLUNTEER, MERCY HOUSING VINEYARD TOWNHOMES OST (OUT OF SCHOOL) PROGRAM, ANAHEIM, CA — AUGUST 2018-MARCH 2019

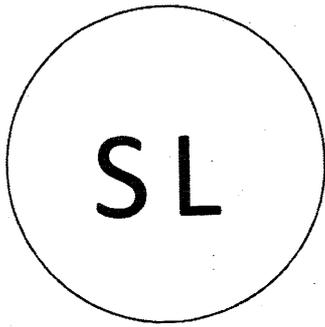
Assist the Out of School program for Mercy Housing Affordable Apartments. Assisted with creation of lesson plans for the program. Create and carry out activities with the children. Assist children with any homework they had for school.

CASE MANAGER INTERN, SOUTH COUNTY OUTREACH, IRVINE, CA — FEBRUARY 2017-APRIL 2017

Helped spearhead the rental and utility assistance program. Screen, interview and evaluate clients for eligibility for financial assistance. Meet with clients presenting major crisis. Ensure that adequate resources are available to clients at all times.

CHILD ADVOCATE, CAST, ORANGE, CA — OCTOBER 2014-MAY 2015

Comfort children who have just experienced child abuse. Help each child feel at ease at CAST by playing games, initiating creative activities, and offering companionship to the child while they are in CAST's care. See to each child's basic needs for food and nurturing during the child's visit. Provide comfort and immediate support to parents and other family members. Observe any unusual behaviors exhibited by children and report these concerns. Assist and support children during medical examinations.



# SANDRA LOPEZ



562.547.1363



se\_lopez@msn.com



Santa Ana, USA

## EDUCATION

M.A. HUMAN RIGHTS  
Kingston University London  
2014 – 2015  
(Distinction)

B.A. SOCIAL WORK  
Cal State University, Los Angeles  
2006 – 2012

## LANGUAGES

SPANISH  
Proficient  
Reading, writing and  
speaking

## PROFILE

9 years of case management experience empowering under-served populations in Los Angeles, Orange County and abroad, while maintaining culturally sensitive awareness. Works well on a team but also thrives individually.

## PROFESSIONAL EXPERIENCE

### FAMILY SERVICES NAVIGATOR

Serving People in Need (SPIN), Costa Mesa, CA | 2020 - Present

Provide Case Management Services to families experiencing homelessness, via diversion and prevention, to locate and secure permanent housing

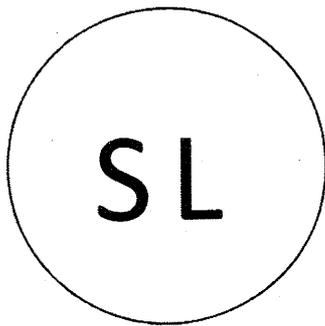
- Coordinate with shelters for openings and potential placement
- Locate and secure permanent housing for families
- Assess families' challenges, strengths, and areas where they may need assistance
- Coordinate with other Access Point in the Family Solutions Collaborative and the Service Planning Areas
- Attend case conferencing and match meetings to advocate and support assigned families awaiting shelter placement
- Responsible for timely entry of case notes, services and client information into Client Track, HMIS and other required data base systems

### CASE MANAGER

Children's Bureau, Huntington Beach, CA | 2017 -2020

Provide Family Support/Case Management Services to families/individuals in crisis while establishing rapport with community members, agencies and local leaders

- Successfully assisted over 250 families experiencing crisis situations such as immediate need for shelter, childcare, health care, legal assistance and domestic violence interventions, by utilizing a strength-based, survivor-driven, and trauma-informed care approach to provide effective case management and referrals
- Co-created and facilitated an educational 2-hour life skills class on healthy eating and exercise to 25 community members
- Conduct intakes and assessments to link families with necessary resources and services to address identified needs
- Collaborated weekly with over 10 community and multi-disciplinary team agencies to present cases
- Delivered culturally appropriate advocacy to clients as needed, i.e in schools, courts and other systems that clients interact with
- Conducted risk assessments around suicide and violence to self or others and reported child and elder abuse to appropriate agencies
- Established rapport and collaborations with school community liaisons, social workers and other service providers



# SANDRA LOPEZ

## SKILLS

Customer Service

Microsoft Word systems

Attention to detail & accuracy

Active Listener

Social Perceptiveness

Cooperation

## TRAININGS

FaCT: Housing Families (FSC) Training-2019

Military Culture and Competence 101-2019

Strengthening Relationships Through Intentional Communication-2018

Mental Health First Aid-2017

Mandated Reporting-2017

## PROFESSIONAL EXPERIENCE CONT.

### CASE OFFICER

Surrey County Council, Woking, UK | 2015 – 2016

First point of contact for the southwest division of the Special Educational Needs unit at the council

- Provided administrative support to outside costumers and colleagues on behalf of the Special Educational Needs (SEN) team
- First point of contact for parents, schools, partner government agencies and the public by phone, post and in person
- Responsible for intake of school/parent Educational Health Care Plan (EHCP) requests and processing, in accordance with strict council deadlines
- Liaised with various care professionals such as Educational Psychologist (EP), Occupational Therapist (OT), Social Workers and Speech and Language Therapist (SLT) to arrange Statutory Request Meetings (SRM's) as per EHCP requests
- Provided crisis intervention over phone and distributed case information to appropriate case officers

### SITTER/BEFRIENDER

Ruils- Disability and Advice Centre, Teddington, UK | April 2015-December 2015

Sitter/Befriender for children and young adults with learning/physical disabilities, mainly in the autism spectrum

- Worked collaboratively with parents and child/young adult to develop monthly activities
- Responsible for taking children/young adults into the community to enjoy and participate in extracurricular hobbies and interests
- Actively promoted the inclusion of disabled children and young people into mainstream activities
- Engaged child/young adult in communication and social skills through various activities that stimulated growth and development

### ADMINISTRATIVE ASSISTANT

Optimist Youth Homes & Family Services, Los Angeles, CA | 2013-2014

Liaison for the Independent Living and Group Home program for a non-profit organization serving at-risk juveniles who become wards of the state.

- Created, tracked and distributed weekly memorandums for therapists' work
- Reviewed therapists/social workers progress notes along with billing to ensure accuracy and compliance of agency and state laws
- Interfaced with outside agencies such as LAC DMH (Los Angeles Department of Mental Health) for maintenance, compliance and IT issues
- Verified monthly Medi-cal (insurance) eligibility making sure to update excel spreadsheets and distribute to finance department
- Performed quarterly audits of patient file folders and therapists/social workers paperwork
- Reviewed and updated, as necessary, all Department of Mental Health documents



**SPIN**  
SERVING PEOPLE IN NEED

A home is the starting place of hope and dreams...

September 22, 2020

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Kim Frazier

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

RE: Rental Assistance Program Administrator for CDBG COVID-19 Costa Mesa  
Rental Assistance Program RFP Cost Proposal

To Whom It May Concern:

Serving People In Need (dba SPIN) is pleased to submit a cost proposal of \$207,000.00 to implement and administer rental assistance for the CDBG COVID-19 Costa Mesa Rental Assistance Program. SPIN will provide rental assistance, program compliance services and case management services for 30 eligible households with children. The Program will be implemented at award of funds and will be fully expended at grant end date.

Please see attached "Cost Proposal" form and detailed cost proposal spreadsheet.

If selected for funding, the Program will be managed from SPIN's main office located in the Coppertree Business Park at 151 Kalmus Drive, Suite H-2, Costa Mesa, CA 92626, phone number 714-751-1101.

Thank you for your consideration of funding.

Regards,

Jean H. Wegener  
CEO



## Cost Proposal

Task	Description	Price per household
A.	Provide 30 Costa Mesa Program eligible residents with children rental assistance, program compliance services and case management services (rental assistance not to exceed \$6,000 per household or 3 month's rental assistance whichever is less)	\$6,900.00
<b>TOTAL</b>		\$207,000.00

*All originals of plans, field notes, data and calculations, reports, electronic files, etc., will be turned over to the City upon completion of work. Ten percent (10%) of the total contract fee will be withheld under final project documents are submitted to the City.*

Serving People In Need, Inc.

RFP Cost Proposal for City of Costa Mesa Rental Assistance Program Administration

Estimated Grant Peiod 10/15/20-6/30/21

Total Grant Request = \$ 207,000.00

<b># of Families to be Served</b>	<b>Max Months of RA per Household</b>	<b>Max RA per Household</b>	<b>Cost per Eligible Household</b>	<b>Total Request</b>
30	3	\$ 6,000.00	\$ 6,900.00	\$ 207,000.00