



REPLY TO RFP

FOR

ACCESS CENTER AND EMERGENCY SHELTER
OPERATIONAL MANAGEMENT SERVICES

DELIVER TO:

City of Lodi
Community Development Department
Neighborhood Services Division
221 W. Pine Street, Lodi, California 95240
Ph: 209-269-4519
NeighborhoodServices@lodi.gov

November 3, 2025

FIVE KEYS SCHOOLS AND PROGRAMS HOUSING DIVISION

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IV. PROPOSER INFORMATION

1. Name of Entity or Organization: **Five Keys Schools and Programs**
2. Physical Address: **320 13th Street, 2nd Fl, Oakland, CA 94612**
3. Mailing Address (if different than above):
4. Executive Director/CEO
 - Name: **Steve Good**
 - Title: **President /CEO**
 - Email: **SteveG@fivekeys.org**
 - Phone Number: **(415) 734-3310**
5. Contact Person (if different than above)
 - Name:
 - Title:
 - Email:
 - Phone Number:
6. Number of years organization has been in business: **22.4 years**
7. Number of years organization has operated as a 501 (c) (3): **21.6 years**
8. Federal Tax ID Number: **81-0622701**
9. Has this organization operated under another name? Yes () No
 - List all previous names: **The San Francisco Sheriff's Department Five Keys Charter School**
10. Are you registered with sam.gov? Yes () No
 - If yes, please provide UEI number **MQ6YNKQJLK85**
11. Number of year's organization has conducted the program for which services are being requested:
Housing facilities operations and services: 8 years
Care coordination and housing referral services: ~20 years

12. 3 References to speak to your organization's work and successes with homelessness services:

Christopher Kramer
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13. Describe your organization's history and experience in providing services to individuals experiencing homelessness:

Five Keys has provided services for unhoused individuals since our inception in 2003 as a school for adults in San Francisco jails. From the start, we saw how students faced complex barriers that got in the way of their education. Our mission broadened as we sought to help our students counter the effects of poverty, homelessness, incarceration, social inequity, and trauma. In 2008, we expanded into community sites by co-locating at neighborhood centers and social service agencies accessible to returning students. Our work soon evolved into serving all adults who sought employment and lacked requisite high school credentials. Our programs expanded to include job readiness, workplace skills, and sector-specific ESL (e.g. English for construction workers). Our schools now operate in 18 jails and at 90 community sites across California. We offer dual enrollment to accelerate completion of high school while students earn college credits at the same time. Our programs also include transitional employment for formerly incarcerated individuals and veterans, offered across 4 counties, including in San Joaquin (Stockton).

In 2018, San Francisco's Department of Homelessness and Supportive Housing (HSH) asked Five Keys to launch the Bayshore Navigation Center, an early example of "harm-reduction" shelters. A year later, Five Keys launched Embarcadero SAFE Navigation Center. Shortly after that, we were asked to rapidly expand to house thousands of vulnerable individuals during the pandemic. Five Keys participated in the City's conversion of unused hotels into quarantine, respite, and shelter-in-place housing. When these sites were later converted into full-time shelters and permanent supportive housing, Five Keys continued to innovate to meet new priorities, becoming adept at renovations and property development.

With these expansions in services, we recognized the opportunity to scale our hiring of individuals who have lived-experience with homelessness, incarceration, and recovery, as they are uniquely qualified to build trust and credibly engage with unhoused populations. Today, we have more than 500 housing employees serving ~5,000 unhoused adults and transitional-age youth with compassionate customer service in San Francisco, Alameda, Solano, and Los Angeles.

We welcome invitations from neighboring counties to expand our housing services, as many of our most dedicated and experienced employees commute long distances and are happy to serve others, closer to home. Our centralized administration and deep bench of experienced leaders allows us to scale quickly according to local needs, while maintaining fidelity to trauma-informed customer service.

As we grow geographically and programmatically, Five Keys readily adapts to location-specific changes in policies and practices. Flexibility is one of our defining characteristics, exemplified by two decades of collaborating with dozens of distinctly different cross-sector partners. For instance, with new mayoral leadership in San Francisco, there is a shift taking place to prioritize recovery care over the harm-reduction model that has been the City's mainstay approach. Five Keys' staff are flexible in adapting to such changes by hiring specialists and deploying new trainings, while reinforcing the core values of our trauma-informed, customer-service model.

You can learn more about Five Keys' housing services at <https://www.fivekeyshousing.org/>

14. Describe the organization's current approach to outreach and service delivery, particularly for unsheltered individuals or highly vulnerable populations:

Five Keys' approach to outreach emphasizes dignity, trust, and community connection. Our housing ambassadors keep sidewalks clean near our shelters, while inviting local residents and businesses to stay connected. We provide a hotline for neighbors to alert us of anyone setting up a tent, seen in distress, or causing damage or harm. Our staff take immediate and appropriate action to offer assistance, and when necessary, reach out to City partners, such as Sanitation and law enforcement.

The Mayor's Office recently expanded our team of ambassadors to broaden our presence and opportunities for engagement on the street. This model allows us to build trust and encourage low-barrier use of shelter services, such as offering access to food and phone use for those who may be hesitant to enter traditional shelters. We recognize the impact of this model as illustrated by Lodi's neighborhood cleanup map and low-barrier day-use services at the Access Center.

Five Keys operates a variety of other "outreach-intensive" programs for homeless populations: Since 2019, we have overseen Pit Stops and Mobile Showers to provide

hygiene services in Los Angeles. In the past year, we logged 1,046,316 visits at 19 sites with toilets and 20,790 showers at 15 sites where we set up trailers. We filled 20,546 garbage bags, picked up 1,755 used needles for hazardous waste; and distributed 31,139 hygiene kits. Community ambassadors improve safety and wellness for unhoused residents and distribute resource cards with information for further assistance.

Five Keys recruits, trains, and promotes staff who are credible messengers for vulnerable, unhoused people because of their relatable lived experiences. Our ambassadors have a remarkable ability to build rapport through sustained outreach, empathy, and real-world understanding of people who choose to stay outside in harsh conditions, rather than enter into shelters. In Lodi, we will offer resource cards and no-pressure invitations to come to the Access Center for day-use services, as a step toward building trust in fuller services.

Trust in Five Keys' ambassadors on the street grows quickly. We have gained a reputation for being helpful in a crisis, as our workers save lives, interrupt crimes, and help trafficked teens find safe haven. Our staff are trained as rapid responders and carry Narcan on their badges at all times, and have reversed more than 2,000 overdoses— not only for housing guests but also for people on the streets near our sites and even during workers' commutes.

Reciprocal referrals have long been defining features of Five Keys' outreach efforts. The presence of wraparound supports and employment resources all under one roof in Lodi Access Center is inspiring to us, as it removes the physical and emotional toll of navigating between fragmented systems and invites healing, engagement, and community connection—all in one place.

IV. PROPOSAL NARRATIVE

1. Service Summary

Provide a summary of the proposed services to be delivered, including a high-level description of work to be performed and the key outcomes your organization expects to achieve.

Five Keys will partner with the City of Lodi, San Joaquin County, and local CES, along with hospitals, workforce agencies, behavioral health and substance use providers, domestic violence and legal services, and other partners to deliver holistic care for people experiencing homelessness. We will offer low-barrier shelter in a clean, safe, and dignified environment; care coordination, and housing navigation for referrals and day-use walk-ins.

Our trauma-informed and culturally responsive model promotes safety, dignity, and self-agency. Each guest is paired with a care coordinator to co-develop an individualized plan for overcoming barriers and reaching goals toward stable housing. Small caseloads of 1:25 allow for intensive support by care coordinators who assist with benefits enrollment, obtaining vital documents, and making connections to health care and specialized services. Five Keys also offers on-site life skills, job training, financial literacy, and digital skills workshops to strengthen self-sufficiency.

Referrals and service engagements will be tracked in a secure database to support outcome measurement and accountability. We will track guest demographics and measures such as the number of individuals engaged through outreach; those accepting shelter placement, average stay, and types of services provided at 30, 60, and 90 days; behavioral health or substance use treatment; encampment engagement coordinated with City partners; and transitions to permanent or stable family reunification housing. Follow-ups will identify individuals needing further services to reduce returns to homelessness.

Five Keys seeks to create a compassionate service environment that advances the City's goals of reducing unsheltered homelessness and improving overall community wellbeing. A sampling of outcomes to be tracked include:

Site Operations:

- ≥ 90% occupancy and bed turnovers within 2 4-hours of exit;
- 3 meals daily for up to 60 individuals plus day-use participants;
- 24/7 Shelter Services for 60 guests and a flex bed capacity up to 208 beds;

Care Coordination:

- 95% of guests receive individualized housing-focused service plans within 7 days;
- 85% of guests become document-ready to support placements in housing;
- 85% will be connected to at least one external service or benefit;
- At least 75% of guests exit to stable housing or family reunification;
- 80% of guests will report qualitative or quantitative progress toward their Individual Service Plan (ISP) goals;
- 70% will engage in at least one on-site activity, such as job readiness, digital literacy, or life skills workshops;

Guest Satisfaction:

- ≥ 80% of those offered quarterly satisfaction surveys will complete it;
- 75% of survey respondents will indicate Strongly Agree or Agree regarding satisfaction with services;
- Grievances are tracked, resolved and audited for continuous improvement;

Outreach:

- 70% of those engaged through outreach will be connected to Behavioral Health or Substance Use Services;

Self Sufficiency:

- 100% will be offered job readiness, job training, job search and/or educational services;
- 75% will engage in these services and 10% will obtain employment;

Data Quality:

- 100% of HMIS entry/exit data submitted within 3 days;
- ≤5% null values in HMIS;
- 100% of guests exited to known destinations;
- ≥80% satisfaction surveys are completed 2x/year.

2. Organizational Experience

Describe your organization's experience with programs or services similar to those described in the RFP. If the scope of work is new to your organization, describe the relevant expertise, partnerships, or resources that will support successful implementation.

Five Keys brings two decades of experience working with highly vulnerable and marginalized populations, many of whom require assistance with housing. We began operating low-barrier, trauma-informed, housing-first shelters in 2018, with the launch of the Bayshore Navigation Center at the behest of the City and County of San Francisco. This was one of the first housing sites in the region to allow pets, partners, and personal belongings. Since then, Five Keys has expanded to operate multiple navigation centers, interim housing sites, and permanent supportive housing programs across 4 counties in northern and southern California. We now serve more than 5,000 unhoused, high-needs, and medically fragile individuals each year, with more than 500 highly trained staff providing 24/7 care, on-demand intakes, and intensive care coordination. Five Keys has leveraged the need for on-site staffing into an opportunity to provide much needed employment in the communities we serve. Our hiring model has become a win-win for uplifting communities where there are persistent and systemic barriers to employment and insufficient affordable housing.

Five Keys integrates supportive services and property management operations into a seamless model that unifies our staff across all roles and creates a consistent, coherent, person-centered guest experience. Our Housing Ambassadors build trust with guests by proactively encouraging participation in supportive services and they are able to share guests' concerns with appropriate colleagues. Ambassadors are trained to recognize behavioral health and de-escalation needs, while our care coordinators manage benefits enrollment, health access, transportation arrangements, and housing navigation support.

To address the multi-dimensional needs of unhoused guests, we leverage a broad network of community partnerships, including behavioral health, recovery, reentry, workforce, and medical providers. In each region, we engage deeply with local systems such as Coordinated Entry, public safety, hospitals, public health departments, and community colleges, tailoring programs to reflect local protocols, resources, and priorities.

Five Keys also leverages our broad scope of programming to expand our services for housing guests, where desired and feasible:

Education: We provide remote access to accredited high school completion;

Workforce: We staff-up housing programs and offer transitional employment for justice-impacted residents through CalCrew programs (including in Stockton);

Digital Equity: Our onsite technology ensures housing guests are supported in navigating benefits systems, applying for jobs, and staying connected to care.

Five Keys successfully launches shelters in places where we are new to the community by engaging respectfully with local partners and investing our time in relationship-building with City and County agencies. Our flexible, solutions-oriented posture, combined with robust administrative infrastructure and expertise has earned us a reputation for delivering thoughtful site-specific implementations, transparent operations, and sincere community responsiveness. We are confident that this experience positions us to support successful implementation and operations of housing services at the Lodi Access Center.

3. Collaborative Partnerships

Describe current and past collaborations with other nonprofits, government agencies, faith-based organizations, and community stakeholders relevant to homelessness, housing, health, or supportive services.

Five Keys collaborates with dozens of agencies and service providers—each with unique missions, culture, and institutional priorities. We cultivate effectively and respectfully to deliver holistic wrap-around support, barrier removal services, trauma-informed care, substance use treatment, medical services, and culturally aligned programming for individuals who are at a crossroads in their lives.

Each time Five Keys begins a program where we are not already established, we prioritize getting to know local providers, local cultures, local perspectives, and local interests. Even when we are already situated in a region, we do not presume to know what is important to new partners. Whenever appropriate, we establish formal and/or informal reciprocal referral agreements.

To strengthen our service capacity in Lodi, Five Keys will draw on our established programs and partnerships in nearby Stockton. We regularly partner with housing services networks, health and social services agencies, the DMV, workforce centers, CBOs, and Sheriffs' and probation departments. Sustaining trusting partnerships is core to Five Keys' model that depends on diverse perspectives and capabilities to deliver holistic support. For instance, referrals to substance use treatment programs and residential therapy are often critical to guests' efforts to make progress toward stability. We build trust over time, through warm handoffs to referred services and by our consistent follow through.

Our partnerships are wide-reaching in San Joaquin County. We are contracted by the Probation Department to deliver "Keys to Change," a Cognitive Behavioral Intervention (CBI) program for justice-involved participants. We operate Back 2 Work Transitional Employment in partnership with CalTrans and CDCR to provide reentry populations and drug-impacted community members paid employment along with training and job placement assistance. We work closely with the City of Stockton's Office of Violence Prevention, WorkNet, and Ready 2 Work to offer employment resources and job referrals tailored to individuals' needs.

Wraparound support is furthered through partnerships with agencies such as Friends Outside, El Concilio, Mary Magdalene Community Services, Catholic Charities, Community Partnership for Families, and United Way of San Joaquin County. Referrals for mental health, case management, and parenting support include Telecare, Parents by Choice/Becoming Main Street, and San Joaquin County Pride Center. We also partner with Prevail Women and Children's Services for domestic violence support and with Three Seeds to provide life skills and empowerment workshops.

Five Keys is committed to forming new relationships in the city of Lodi and honoring the work of existing providers, many who like Five Keys have been mission-driven for decades. We will collaborate with local partners to ensure services are integrated, complementary, and responsive to the specific needs of the Lodi Access Center and surrounding community.

4. Operational Methodology

Provide an overview of your approach to operating the City's Access Center and Emergency Shelter, including how you plan to scale services to meet evolving needs.

Five Keys' operational methodology balances centralized administrative infrastructure, site-specific flexibility, and consistent and comprehensive staff training. Our approach enables efficient scaling while keeping our focus on customer service as the foundation for all of our housing programs. With 15 housing sites across four counties, we have developed a model that can be tailored to Lodi's evolving needs, while ensuring fidelity to best practices in trauma-informed care, harm reduction, and client-centered engagement.

Five Keys' centralized operations ensure consistent attention to core values, compliance, and quality controls. Our knowledgeable leadership oversees contract fidelity, policy development, and staff training. Site-specific directors and supervisors focus on place-based day-to-day operations with flexibility to respond to each community's specific needs, challenges, and priorities.

We are able to stand up new facilities quickly—often in under 30 days—by drawing on standardized systems and templated protocols that can be modified to fit local expectations. We have consistent systems for intake and exit processing aligned to CES procedures, reporting, and communications, with nuanced differences for each site location. When launching at a pre-existing site, we are sensitive to the interests of incumbent employees and welcome applications from prior staff who are interested in adopting Five Keys' approaches and culture. We appreciate the experience and continuity in relationships with guests that incumbent staff bring to the site. We have also promoted prior staff who show talent and readiness for more responsibility. To create a positive experience for shelter guests, Five Keys onboards and trains previous and new employees at the same time to foster collegial bonds and a shared intent in providing consistent high-quality customer service.

Our Ambassadors are the heart of operations. They are cross-trained in site security, de-escalation, harm reduction, hospitality, and guest services—allowing for operational agility without sacrificing coverage or care. Ambassadors work both in and around the site, conducting outreach to neighbors and engaging with people in need who are on the street. Ambassadors offer staffing flexibility to ensure full coverage when there may be a spike in need because of emergency situations or severe weather conditions.

Five Keys creates safe, clean, and welcoming environments that affirm each guest's dignity, autonomy, and potential. We intentionally use non-stigmatizing language by referring to clients as "guests" and calling our case managers "care coordinators" to reflect our values and cultivate a sense of belonging and self-determination. Staff are trained to anticipate needs, reduce barriers, offer choices, and promote wellness, while reinforcing a sense of personal agency and community.

Five Keys' model is built to adapt. We scale services based on occupancy, seasonal demand, policy changes, and local directives, while maintaining a high standard of care. New services or activities can also be integrated quickly, involving local and regional partners, making Five Keys a stable and responsive long-term partner.

5. Tasks and Implementation

Specify the key tasks and activities your organization will undertake to accomplish the program's goals. Explain how and when these activities will be implemented and monitored for success.

Prior to launch, Five Keys will conduct a site walk-through and finalize an Implementation Plan in collaboration with City of Lodi representatives. The Plan includes scheduling staff training, onboarding personnel, confirming procurement of supplies, and conducting community outreach to ensure a smooth opening and alignment with the City's priorities.

The Lodi Access Center will operate 24/7 and welcome guests with a trauma-informed, low-barrier approach. Full intake and orientation are completed within 24 hours of guests' arrival. We manage two versions: Comprehensive intakes are typically conducted Monday–Friday, 8:00AM–4:30PM and a streamlined version (focused on essential-data and getting the guest settled) are used during other hours, followed by a full intake and orientation during the next shift. Intakes include informed consent, explanation of expectations and grievance procedures, and an introduction to site amenities. Onsite services include meals, hygiene supplies, showers, laundry, pet accommodations, structured enrichment activities, and job readiness programs. Intakes are supplemented or modified as needed to address language access, cognitive limitations, or disability, ensuring each guest is fully informed of their voluntary participation.

Each guest is assigned a care coordinator to support individualized case planning and service engagement. Within 72 hours of entry, the care coordinator conducts a one-on-one to develop an Individual Service Plan (ISP) tailored to the guest's unique needs and goals. Medical and behavioral health referrals are initiated within the first week. ISPs typically include housing readiness strategies, benefits advocacy, and barrier removal activities. Care coordination check-ins occur at least weekly to monitor progress and adjust supports. ISP plans also guide referrals to wraparound services such as behavioral health care, primary and urgent medical services, public benefits enrollment, legal assistance, and employment resources. Five Keys will reach out to Lodi-based service providers, faith-based groups, City leaders, and neighborhood associations and integrate our program into the local care ecosystem. Guests will be provided access to transportation for medical, housing, and administrative appointments.

Housing navigation is a priority: Five Keys will engage local partners and landlords in Lodi to establish referral pathways and placement options. Care Coordinators will work with each guest to develop plans for sustainable, permanent housing.

Walk-in guests also have access to meals, laundry facilities, device charging, and use of phones and computers. Our Care Coordination team is available to assist day-use guests with housing applications, right-to-work documentation, transportation needs, and referrals to local resources. For individuals who are not yet ready to commit to overnight stays, low-barrier daytime services create opportunities for trust-building and a bridge toward more stability.

Data is meticulously recorded in HMIS and Salesforce. Intakes, discharges, and bed turnover are logged daily and reported promptly to CES to maximize bed utilization. Program leadership conducts weekly reviews of data that informs adjustments in services. Ongoing monitoring of outcomes supports continuous improvement.

6. Shelter Operations Capability

Demonstrate your organization's capacity to develop, implement, and manage an emergency shelter. Include a brief summary of your organizational infrastructure, staffing, and internal systems.

Five Keys has a proven record of developing and managing housing programs for individuals with complex, co-occurring needs. Our ability to launch programs quickly is rooted in our scalable infrastructure, rigorous staff training, and refined systems—all guided by our commitment to dignity, safety, and service.

Five Keys currently operates 15 housing sites across San Francisco, Alameda, Solano, and Los Angeles, including Navigation Centers, Tiny Homes, PSH, and Shelters, as well as Rapid Rehousing programs. These are supported by systems for finance, HR, IT, compliance, and quality assurance. Our annual budget (across all divisions, including housing, education, reentry, employment, and workforce development) exceeds \$120 million, accounting for 1,100+ employees serving more than 15,000 individuals at 100+ program sites in 15 counties. We maintain a clean financial record with no outstanding debt, outside of real estate with all loans in good standing. A third-party accounting firm, EdTec, ensures full compliance with OMB Uniform Guidance and procurement standards.

Five Keys has extensive experience launching and stabilizing housing operations under tight timelines. During the pandemic, we opened 10 sites within 15 months, including a 400-room hotel and large congregate shelters in repurposed facilities. Recently, we successfully opened new programs in Vallejo and Los Angeles, demonstrating readiness to operationalize shelters within weeks of site approval. Lodi's Access Center model is exciting to us in how it exemplifies "low-barrier" by bringing together complementary services, and allows for day services to foster engagement and trust-building with individuals not yet ready to accept night-stays. Our team is experienced in flex-bed management, adapting capacity and staffing to meet fluctuating needs, while maintaining safety and compliance.

Care Coordinators integrate wraparound supports, housing navigation, behavioral health and medical referrals, employment readiness, education, and transportation assistance through collaborations with dozens of agency partners, and community-based organizations. For Lodi, we will partner with San Joaquin County Behavioral Health Services and local healthcare providers. Five Keys welcomes guests with their pets, possessions, and partners, offering secure storage areas and pet-friendly spaces that meet health and safety standards.

Our staff complete a thorough two-week orientation and ongoing annual trainings. Each shelter is staffed with a site director, shift supervisors, care coordinators, ambassadors, and janitorial personnel. Ambassadors are cross-trained in a multitude of operational roles and all staff participate in quarterly emergency drills. We prioritize local hiring and value lived experience, with more than 90% of our supervisors and managers promoted from within. All sites maintain a trauma-informed, secure environment with controlled entry, surveillance, and clear behavioral expectations. Incidents are managed according to established protocols, balancing safety with compassion. Five Keys maintains robust data and reporting systems, providing monthly outcome reports on housing placements, job attainment, and service linkages. Continuous quality assurance, performance dashboards, and regular audits ensure transparency and accountability. We use Salesforce Nonprofit Cloud, compatible with HMIS, to manage case tracking, performance metrics, and contract compliance.

7. Admission and Program Participation Procedures

Provide detailed policies and procedures related to the intake and sheltering process, including:

- Client rules and guidelines
- Identification requirements
- Screening and assessment protocols
- Bed reservation and allocation system
- New client orientation process
- Policies for day-use clients and services
- Returning client procedures
- Exit and re-admission criteria for disqualification

Samples of Five Keys' policies and procedures are attached as ***Exhibits, starting on page 41.**

Program Rules: All guests are expected to follow our “Community Guidelines” that ensure a safe and inclusive environment. Expectations around conduct are reviewed during orientation and posted. We enforce zero tolerance for violence, threats, harassment, or discrimination. Weapons must be checked and stored securely by staff. Guests are responsible for maintaining clean, clutter-free personal spaces. Theft or ongoing disruptive behavior may result in discharge, subject to the grievance/appeal process. ***See Exhibit #7.**

Identification: Guests are not required to show government-issued IDs to access services. For clients without ID, care coordinators assist with barrier removal and recovery of essential documentation needed to secure sustainable housing.

Screening/Assessment: After referral or walk-in, a screening is conducted to determine current housing status, immediate health and safety needs, and eligibility for shelter or day-use services. Additional assessments are conducted by care coordinators to inform individualized support plans and prioritized connections to barrier removal services.

Reservation System: Five Keys maintains real-time tracking of bed assignments in our Salesforce platform. Vacancy reports are shared promptly via HMIS to expedite turnovers. Beds may be reassigned if a guest is absent for more than 48–72 hours without an approved reason. Walk-up clients will be triaged according to Lodi's approved criteria and ensured equitable access through coordination with city-designated staff. ***See Exhibit #6.**

Client Orientation: All guests receive orientation on community rules, safety procedures, available services, and grievance processes. Guests review and sign a Release of Information and Participation Guidelines. All materials are provided in plain language and accessible formats; staff are trained to read and explain policies for guests with limited literacy, and if under the influence, repeat policy reviews the next day. A guided tour is provided of key areas to increase comfort and sense of welcome. ***See Exhibit #8.**

Day-Use Policies: Day-use guests are recognized as potentially being eligible for night-stays and are made to feel welcome to encourage continued engagement. Restrooms, showers, laundry use, meal access, phone and computer use, care coordination, and service referrals are available for day-use during posted hours. Behavior and safety rules replicate those for overnight guests. Staff collect basic demographic information and screen for immediate needs, offering warm handoffs to care coordinators or on-site partners. Guests who exhibit unsafe behavior may be restricted from accessing services, after due process. ***See Exhibit #5.**

Returning Clients: Former guests seeking to return may be re-admitted based on current availability and prior program history. If discharged due to behavioral or safety concerns, a case review is conducted prior to re-entry. Approved returning guests complete a new intake, sign updated forms, and re-review site rules and procedures.

Disqualification: Guests may be exited if they pose an immediate safety threat, engage in violence, severe harassment, or property destruction; or repeatedly violate site rules after documented attempts to resolve the issue. Whenever possible, guests are offered support to transition to alternative services. Re-admission requests are reviewed on a case-by-case basis.

8. **Connection to Services and Housing**

Explain how your organization will coordinate and refer clients to supportive services and housing programs. Describe partnerships or systems used to facilitate these connections.

Five Keys' approach connects guests to referred services through real-time coordination and warm handoffs. Relationship-building with partners promotes mutual commitments across systems. We don't treat referrals as transactions, but as transitions designed to help guests overcome barriers to sustained housing.

System Navigation and Warm Handoffs: Our care coordinators support guests with goal-setting, care planning, and proactive system navigation. Referrals are tracked and our staff remain in touch with both the guest and external service provider. We emphasize warm handoffs when possible: providing transportation and coordinating with providers to ensure the guest is received in a dignified and trauma-informed way. For guests who have faced barriers, our trauma-informed engagement sees every new connection as an opportunity to rebuild trust.

Interconnected Data Systems: Five Keys uses a customized Salesforce platform as our internal tracking system that supports data entry into HMIS. We track intakes and exits, log referral outcomes, track benefit acquisition (Medi-Cal, CalFresh, GA, SSI/SSDI), and monitor housing readiness. Weekly review meetings help staff identify stalled referrals, adjust service plans, and close feedback loops with partner agencies. This dual-system enables flexible, scalable service coordination without sacrificing data integrity. It also allows us to spot systemic gaps in services and work with the City or County to propose targeted improvements.

Connecting People: Five Keys humanizes engagement by referring to clients as "guests" and encouraging community connection. We offer activities such as workshops, holiday meals, health fairs, and fun activities that blur the lines between recipients of our services and area residents—offering all the chance to feel a sense of belonging.

Similarly, our relationships with partner organizations are based not only on MOUs but on real-time collaborative communications that troubleshoot challenges together. And, within the shelter, Five Keys' ambassadors are trusted and relatable to guests. They conduct daily wellness checks that build on this trust to surface immediate needs. Their consistent presence encourages guests to remain engaged with their service plans.

Adapting to Close Gaps: Five Keys' care coordinators continuously expand our network of community partners to be able to adapt service plans to each guest's needs. In Lodi, we will engage Lodi-based providers and draw from our Stockton-based partnerships to fill service gaps (e.g., more detox options, greater LGBTQIA+ affirming care, expanded hours, etc.) to

ensure that no guest is lost between systems. Five Keys' client-centered model is based on the premise that connection provides continuity; and continuity is what enables people to experience genuine transformation.

9. **Housing-Focused Goals**

Describe your strategy for minimizing length of stay and assisting clients in obtaining permanent housing.

Five Keys approach is to focus on housing from intake through the last phase of a guest's stay. We aim to help guests stabilize quickly, resolving barriers to sustainable housing as efficiently as possible.

Upon entry, each guest completes a housing-focused assessment and is assigned a Care Coordinator who meets 1:1 to co-create an Individual Service Plan (ISP) within 72 hours. These plans identify key barriers, such as the need for identification, income documentation, treatment of health issues, or unresolved legal matters. With a clear path toward housing, weekly 1:1 check-ins are used to make progress, monitor results, and ensure momentum is maintained.

Wraparound services—including behavioral health referrals, benefits enrollment, employment support, and life skills coaching—are provided directly or via referrals to partners to address the drivers of housing instability. Guests are supported in gathering documentation such as Social Security cards, state IDs, income verification, and proof of homelessness status. Transportation to housing appointments, interviews, and move-ins is coordinated to reduce logistical barriers. Integrated supports accelerate guests' readiness for stable housing and contribute to smooth transitions.

Care coordinators act as housing navigator liaisons to local landlords, public housing authorities, and permanent supportive housing (PSH) providers. They help guests complete housing applications, prepare for interviews, and overcome common screening obstacles. Five Keys will leverage staff to cultivate relationships with Lodi-based housing providers and landlords in order to establish referral pathways to available inventory. We will participate in local case conferencing systems where applicable and monitor guest data to align anticipated housing availability with internal forecasts of each guest's level of readiness to sustain housing.

All progress and unresolved barriers are tracked in Salesforce and HMIS, with weekly reviews by program leadership to adjust strategies to fortify a housing-focused orientation throughout each guest's stay at the Access Center.

10. HMIS Participation

Detail your organization's past or current use of HMIS and outline your plan to ensure compliance with all data entry and reporting requirements.

Five Keys is an experienced user of Homeless Management Information Systems (HMIS) across San Francisco, Alameda, Los Angeles, and Vallejo. We exceed program goals in each county, tracking different requirements, assessment questions, goals, and HMIS portal access protocols. While operating in Lodi would be our first experience within San Joaquin County's HMIS, Five Keys' data team is committed to aligning our data protocols and staff training to meet the compliance standards of SJCoC. We are fully prepared to comply with all local requirements and will work closely with the system administrator to ensure seamless integration. Five Keys provides thorough onboarding so relevant staff are well-trained in requisite data systems and we provide ongoing training to continually upgrade these skills. Our internal tracking through Salesforce is aligned with each county's HMIS standards to ensure consistency between internal and external systems.

Five Keys enters guest data into HMIS systems within 24 hours of intake and logs exits within one business day—often sooner, to maximize bed turnovers. We maintain accurate records of services, outcomes, and referrals, with our entries consistently reflecting less than 4% null values across all required data fields. We have well-developed internal protocols for reviewing data, conducting internal audits, and submitting timely, complete responses to funders' compliance inquiries. Supervisors conduct weekly meetings to ensure that all staff are up to date with data entry, billing, and reporting responsibilities.

We are committed to protecting client confidentiality and follow rigorous standards around Release of Information (ROI) and data security. Guests are informed of how their data is used, stored, and shared, and no data is entered without their consent, unless legally required.

Five Keys is also prepared to participate in real-time case conferencing and data-sharing via the SJCoC system, which supports timely and accurate referrals based on eligibility and acuity. Our housing staff are trained in using CES' and HMIS tools and we will establish partnerships with the local CoC and regional access point agencies in Lodi to ensure smooth integration and service delivery.

As part of our ongoing commitment to collaborative care, we are open to participating in local HMIS-related workgroups or data quality initiatives led by the CoC to support systemwide improvements and transparency, as we do in Los Angeles. We see this type of participation as critical not just for compliance, but for helping more unhoused individuals access the housing resources they need more quickly and equitably.

11. Coordinated Entry Participation

Describe how your organization engages with the local coordinated entry system to assess client needs and match them with available services.

Five Keys has deep experience working within Coordinated Entry Systems (CES) in each of our housing service areas. We work in alignment with the local Continuum of Care (CoC) and adhere to CES policies to ensure that clients' needs are assessed fairly and equitably, and that referrals to housing services are coordinated through shared systems and protocols.

Our team is fully trained in using CES tools for locally mandated assessments, depending on the jurisdiction. Tools such as the VI-SPDAT help us evaluate acuity, determine client eligibility, and match individuals to the most appropriate and available services. In San Francisco, for instance, we regularly coordinate with CES to bring assessors on-site to meet with high-acuity guests who are unable to travel to a formal access point. In Los Angeles, Vallejo, and Alameda, our intake staff are trained to conduct CES assessments directly and enter clients into the system. We coordinate closely with local HMIS administrators to ensure assessments are entered accurately and consistently, to each region's local standards.

Five Keys is experienced in conducting full and partial intakes on site, depending on the hour of entry. During non-business hours, we expedite entry and finish a full intake at the earliest opportunity. Five Keys maintains strong relationships with CES lead agencies and referral partners so that guests are properly queued for the most appropriate services and housing placements.

In Lodi, we will coordinate directly with San Joaquin County's CES system through 2-1-1 San Joaquin; and build referral and data-sharing relationships with designated local access points and other CES-participating agencies in the region. Our staff will ensure all new intakes are assessed and enrolled into CES, and we will collaborate with regional partners to keep real-time bed availability and guests' status updated.

We are committed to supporting the regional CoC's vision of equitable, coordinated access to housing and services. By integrating our housing-focused care coordination into CES workflows and supporting shared system goals, we help to ensure guests of the Access Center move efficiently through the system toward stable housing.

12. Accessibility and Inclusion

Describe how the proposed program will ensure accessibility for individuals with physical, mental, or developmental disabilities and those with other special needs.

Five Keys' person-centered, trauma-informed approach ensures that every guest—regardless of physical ability, mental health status, language proficiency, cognitive capacity, or other access challenges—can fully engage in and benefit from our program. Five Keys is committed to reducing barriers, promoting equity, and creating an inclusive, welcoming environment for all.

We operate in full compliance with the Americans with Disabilities Act (ADA), the Fair Housing Act, and all applicable state and federal civil rights laws. Accessibility is fundamental to our core philosophy. We make sure that accessibility features such as ramps, restrooms, and common areas remain ADA-compliant. We proactively address barriers that may not be visible, including sensory sensitivities, trauma histories, and behavioral health needs. Staff receive training in implicit bias, LGBTQ+ inclusion, and anti-discrimination practices.

Our staff training includes working with individuals with disabilities, people experiencing mental health challenges, and people from historically marginalized communities. Intake and service delivery are adapted to individuals' needs. For example, we offer quiet spaces and modified intake for guests with cognitive impairments or in crisis. We use plain language and alternative communication tools for those with low literacy or developmental disabilities, and we provide interpretation services and translated materials to ensure that language is never a barrier.

ISPs account for mobility, behavioral health, or other adaptations to advance each individual's progress toward housing stability in a way that feels manageable and empowering. Service animals are accommodated under ADA guidelines and policies for companion pets recognize the importance of animals to guests' emotional wellbeing.

Transportation is available for guests who need help getting to key appointments, whether for medical care, behavioral health services, court appearances, benefits enrollment, or housing navigation. Our team coordinates logistics as part of our commitment to ensuring access to wraparound supports.

Five Keys prioritizes respectful and affirming engagement so every guest can feel safe, seen, and respected. In short, we meet people where they are. Whether a guest is navigating physical disability, behavioral health challenges, trauma, or systemic barriers, our goal is to remove obstacles so every person has a clear path forward to housing.

13. Outreach to Unsheltered Individuals

Share your plan to proactively reach out to Lodi's unsheltered population and encourage their voluntary transition to the Access Center.

Five Keys will lead a coordinated, compassionate outreach strategy to engage Lodi's unsheltered residents and support their voluntary transition into the Access Center. Our approach centers on relationship-building, dignity, and immediate connection to services that reduce harm and promote stability. Staff with lived experience play a pivotal role in successful outreach engagement.

Street-Level Engagement: Trained outreach staff will conduct regular visits to encampments, sidewalks, vehicles, and other locations where unsheltered individuals are known to reside. These teams will provide clear information about the services offered at the Access Center, emphasizing that participation is voluntary and low-barrier. Outreach will be conducted in coordination with local partners.

Warm Handoffs and Mobile Intakes: Outreach workers will offer same-day transportation to the Access Center and provide warm handoffs to care coordinators and shelter staff. For individuals not ready to enter immediately, we will offer resource kits (e.g., hygiene supplies, water, food) and continue follow-up contact to build trust over time. Mobile intakes and pre-registration will be available in the field to reduce delays once a guest is ready.

Trauma-Informed Approach: All engagement will be trauma-informed and culturally responsive. Staff are trained to approach individuals respectfully, avoid coercion, and identify signs of medical or behavioral health needs that may require urgent attention. Outreach is designed to meet people where they are—physically and emotionally—and support them in taking the next steps toward shelter and housing.

Local Collaboration: Outreach will be conducted in coordination with local partners, including San Joaquin County behavioral health teams. We will align efforts with the City of Lodi, San Joaquin County's Coordinated Entry System, and local service networks to avoid duplication, coordinate access points, and ensure streamlined referrals. Through consistent presence, transparent communication, and effective follow-up, Five Keys will serve as a trusted on-ramp to stabilization for those living unsheltered in Lodi.

14. Community Engagement and Good Neighbor Plan

Provide a detailed "Good Neighbor Plan" that includes:

- Communication with residents, businesses, and community groups
- Public education and outreach
- Security and property management
- Responsiveness to neighborhood concerns
- Strategies to minimize community impact

Five Keys is committed to being a respectful, responsive, and engaged neighbor. Our attached Good Neighbor Plan (***See Exhibit #11**) reflects Five Keys' long-standing values around dignity, safety, transparency, and collaboration with community stakeholders. San Francisco HSH adopted our version of the plan for use by all of its site operators.

Communication: Five Keys' designated site representative will attend neighborhood meetings, community events, and City-led briefings. We will maintain an open line of communication with area residents and business owners through a 24/7 dedicated hotline—answered by an on-site supervisor with authority to respond promptly to questions, concerns, or emergencies. This 24/7 hotline ensures any neighborhood issue is acknowledged and addressed in real time. Five Keys also welcomes opportunities to offer site tours and listening sessions to promote familiarity with our services and staff.

Public Outreach: Five Keys will work with the City to ensure the public is aware of the services available at the Access Center. We will share how we increase cleanliness and safety in the neighborhood, while increasing understanding and reducing stigma. Our staff actively build rapport with neighbors and support efforts that humanize our guests, elevate the lived experience of staff, and foster shared responsibility for community wellness.

Security: Ambassadors provide visible, non-punitive oversight of the facility's perimeter, helping to prevent loitering, ensuring guest safety, and promoting a welcoming environment. Ambassadors conduct regular cleanups, sidewalk checks, and coordinate with city sanitation or pest control services as needed. We maintain clear entry and exit areas and monitor flows to avoid disruption. Driveways and public walkways will remain accessible at all times. Quiet hours are enforced each evening through morning, and we promptly address any excessive noise or behavior concerns.

Responsiveness: Community members are provided a hotline that is monitored 24/7. Concerns are tracked and documented and elevated to site leadership when necessary. Follow-ups with community members are handled with urgency and transparency. We also provide opportunities for guests, staff, and community partners to come together to share suggestions that help us refine operations to uphold community values.

Minimizing Impact: Five Keys' staff consistently monitor outdoor areas to ensure public spaces remain clean and unblocked. The co-location model of the Access Center supports convenient hand-offs and efficient service delivery, reducing the amount of service-related traffic to and from the site. Guests are engaged in on-site activities to reduce the time spent idle or offsite. Guests with pets are required to comply with our pet policy to prevent disturbances.

Five Keys has gained a positive reputation, where neighbors who initially expressed objections or skepticism have experienced the positive impacts of our work and become our most enthusiastic supporters of our shelter sites.

15. Security Policies and Procedures

Describe your proposed security plan, including policies related to:

- Secured entry/exit points
- On-site security personnel
- Loitering deterrence
- Conflict de-escalation
- Client property storage
- Handling of weapons or contraband
- Coordination with law enforcement
- Overflow bed management

Five Keys will implement a trauma-informed security plan for the Lodi Access Center.

Entry/Exit Points: Ambassadors will check in guests, verify identities, and screen for prohibited items. The Access Center's entrance will be staffed 24/7 by Five Keys' ambassadors when not otherwise covered by the Center's overall security staff.

Security: Each shift will include Five Keys' ambassadors trained in trauma-informed care, de-escalation, and nonviolent crisis intervention. Ambassadors combine traditional safety duties with a supportive and communicative presence as they conduct rounds, monitor security cameras, and maintain a visible but non-threatening presence in common areas such as the dining hall, multipurpose room, and exterior courtyards.

Loitering Deterrence: To prevent disruption near the facility, loitering will not be permitted in front of or around the site. Ambassadors will conduct frequent exterior patrols and redirect lingering individuals toward appropriate services. Five Keys' Good Neighbor Policy promotes a coordinated response, keeping sidewalks and entrances clear and ensuring guest flow does not disrupt neighbors or co-located services.

Conflict De-escalation: All Five Keys' housing staff are trained in de-escalation, trauma-informed engagement, and Narcan administration. Incidents of conflict are addressed immediately, using nonviolent intervention strategies. Staff document all incidents and follow Five Keys' incident reporting protocol. Law enforcement is contacted only when safety cannot be maintained through internal intervention.

Property Storage: Guests will be provided individual lockers in the dorm area. Overflow storage will be available for larger items (e.g. suitcases or mobility equipment) in a designated area monitored by staff. Property left behind after discharge will be held for 14 days, then discarded in accordance with posted policy.

Contraband: Weapons, alcohol, and illicit drugs are strictly prohibited. Guests' belongings are subject to visual screening and hot-box sanitization. Prohibited items are confiscated, documented, and stored securely or discarded, per protocol. Guests found with contraband after admission may face progressive discipline or exit from the program, depending on the violation.

Coordination with Law Enforcement: Five Keys maintains strong relationships with local police and emergency services. While the goal is to manage security internally whenever possible, local law enforcement will be contacted in accordance with escalation protocols when safety threats arise. Supervisors maintain a direct line of communication with law enforcement liaisons for routine updates and urgent coordination.

Overflow Management: When the Access Center reaches capacity, staff will notify the CES to activate overflow protocols. Five Keys will attempt to place guests at alternative shelters or safe overnight locations. No guest will be turned away without being offered a next-step option, and all overflow activity will be logged and reported to the City.

This comprehensive security plan balances structure and empathy to ensure the Lodi Access Center is safe, calm, and accessible to those seeking shelter and support, while being respectful of the needs and concerns of the surrounding community.

16. Health and Safety Policies

Describe your proposed policies related to client health and safety, including:

- Prescription medication handling
- Use of over-the-counter medications
- Infection control protocols
- HIPAA compliance and client confidentiality

Five Keys' health policies are rooted in trauma-informed care, harm reduction principles, and public health best practices. Although we currently opt to not provide medical or recuperative services on-site, we will coordinate timely referrals to ensure guests have access to care. While we focus on delivering core housing services for the City, we remain open to expanding the scope of on-site work to leverage CalAIM reimbursements in the future.

Controlled Substances: Possession of illegal drugs, alcohol, or unprescribed controlled substances is prohibited on site. Guests are oriented to these rules at intake, and violations are addressed through progressive discipline, which includes safety interventions and potential discharge.

Prescriptions: Guests may retain their prescribed medications. For those who require support, our staff can safely store medications to ensure they are not misused, but we will not administer or monitor dosages. For concerns regarding medication adherence or side effects, guests will be referred to local health providers.

Over-the-Counter: Guests may retain OTC medications such as pain relievers or allergy medications, provided they do not pose safety risks. Items with higher misuse potential (e.g. sleep aids, cough suppressants) may be stored by staff, upon review. Guests are supported with referrals to healthcare providers to address concerns or questions.

Access to Medical Care: Our staff will support guests in accessing medical, dental, and behavioral health services through coordination with local providers, including, but not limited to Adventist Health, Community Medical Centers, and San Joaquin County Behavioral Health. Care Coordinators will assist guests with transportation planning, appointment scheduling, and benefits enrollment. In the event of a medical emergency, staff will contact 911 and remain with the guest until EMTs arrive.

First Aid / Emergency Response: Fully stocked first aid kits are kept in staff areas and checked monthly. Designated staff are trained in basic first aid, CPR, and administration of Naloxone (Narcan) for opioid overdoses. Emergency protocols such as medical response, shelter-in-place, and evacuation are posted and included in staff training.

Disease Prevention: Five Keys follows CDC and California DPH guidelines. Staff and guests are educated about hygiene and respiratory etiquette. Staff regularly clean and disinfect high-touch surfaces and shared spaces. We provide hand sanitizer, masks, and cleaning supplies. If a guest presents symptoms of a communicable disease, we coordinate with public health officials and quarter off space for temporary isolation and medical referral.

HIPAA: All health-related guest information is handled in compliance with HIPAA. Records are secured in locked files or encrypted digital platforms and are accessible only to authorized personnel. Information is never shared without written consent, unless required by law.

COVID-19: While no longer subject to emergency declarations, we remain vigilant and responsive to public health guidance. Our team will follow recommendations from County Public Health and may implement temporary safety measures to minimize transmission risk, if outbreaks or exposures occur.

Five Keys' health policies ensure that guests at the Lodi Access Center are protected, supported, and connected to appropriate medical and behavioral health services.

17. Facility Maintenance Plan

Explain how your organization will maintain a clean, safe, and sanitary facility environment on a daily basis.

Five Keys will maintain a clean, safe, and sanitary environment at the Lodi Access Center through a multi-layered approach that includes ambassadors, janitorial staff, and maintenance technicians, as well as all frontline staff who elevate community pride to create a welcoming space for all.

We have budgeted 2 janitorial staff who clean communal areas, bathrooms, kitchens, offices, and sleeping dorm spaces with regularly scheduled rounds, multiple times per day, with an extra focus on restrooms and high-touch surfaces. The kitchen is shut down for cleaning twice daily.

Ambassadors continually monitor the dorm area 7-days-a-week to encourage guests to keep their areas free of clutter, stacked items, or dangling cords. Ambassadors look for damage to furnishings and graffiti on surfaces that need to be mitigated promptly. No food is permitted in the dorm area to prevent infestations of pests. All belongings and donated goods are treated in a hot box before coming into the building, to avoid bug beds.

Property Repairs: Five Keys ensure facilities are clean, safe, and ADA compliant. Staff will conduct routine inspections and alert the City if systems need servicing. More complex repairs will be addressed swiftly by coordinating with the City and their licensed contractors. When repairs are underway, Five Keys will post signage and take measures to minimize disruption to guests.

Unit Turnover and Safety Checks: As guests exit, ambassadors inspect the bed area, addressing any unsafe or unsanitary conditions. The Site Manager and City's Maintenance Technician will be alerted of conditions outside the norm. Our rapid turnover protocol prioritizes immediate readiness of bed spaces to reduce vacancy time and ensure swift access for new referrals.

Ambassador Engagement: Our staffing model reflects the specific needs for each site, based on the layout and hours of services. Ambassadors serve as trusted stewards of the site, keeping an eye out for disruptions, damage, or safety issues, while tidying areas and restocking frequently needed supplies to ensure a consistently welcoming environment.

18. Transportation Plan

Describe your proposed transportation-related policies and procedures, including:

- Client transportation to/from the Access Center facility
- Transportation of new clients and their belongings
- Response to emergency transport needs initiated by Police or City staff
- Receiving donations and deliveries

Five Keys coordinates transportation to respond to guests' needs, while minimizing disruption in the neighborhood.

Client Transportation: Transportation of guests will use a mix of bus passes, rideshare vouchers (Lyft/Uber), and local cab services. Staff will assess transportation needs as part of the intake process and help guests navigate to and from key services, including medical appointments, housing interviews, public benefits offices, and job readiness activities. ADA-accessible options will be available for individuals with disabilities or mobility challenges. Transportation assistance will also be provided for planned discharges or transitions to the shelter, housing, or treatment programs.

New Clients' Belongings: For guests referred by outreach teams, law enforcement, hospital discharges, or other systems, Five Keys' staff will ensure guests arrive safely with their personal belongings. Ambassadors assist in receiving guests' items with a hot-box and storing items in the dorm or in overflow storage.

Emergency Transport: In the event that Lodi Police, outreach staff, or city partners identify an unsheltered individual as needing immediate placement, Five Keys will respond quickly to assess capacity and coordinate logistics for arrival. A supervisor-level contact will be available 24/7 to support prioritization efforts. For medical emergencies, 911 protocols will be followed.

Donations and Deliveries: Deliveries will be scheduled during designated hours to minimize disruption of neighbors. Five Keys' team based in Stockton will pick up deliveries of donations, which will be hot-box, sanitized and logged into an inventory system that considers shelf life, usage frequency, and hygiene.

All staff and drivers involved in guest transport or delivery logistics will be trained in safety protocols, and all vehicles will be appropriately insured, maintained, and ADA-compliant where required.

19. Nondiscrimination and Equity Policies

Detail your organization's policies for:

- Compliance with all applicable federal and state civil rights laws
- Adherence to the Americans with Disabilities Act (ADA)
- Prevention of sexual harassment
- Policy on identifying alternative resources for individuals not eligible for onsite services (registered sex offenders, disqualified due to behaviors, etc.)

Applicable laws: Five Keys maintains strict adherence to all applicable federal, state, and local civil rights laws, including Title VI and VII of the Civil Rights Act, the Fair Employment and Housing Act, and related nondiscrimination statutes. Our policies explicitly prohibit discrimination, harassment, or retaliation based on race, ethnicity, religion, sex, gender identity or expression, sexual orientation, disability, age, national origin, citizenship status, language, or any other protected characteristic. Our policies are reinforced during onboarding, training, and posted notices.

Americans with Disabilities Act (ADA): All of Five Keys' housing facilities meet ADA accessibility standards, with accommodations in restrooms, sleeping areas, showers, pathways, etc. We are aware that guests may not exhibit physical, sensory, cognitive, or mental health disabilities but still need assistance. We provide multi-sensory and large-print signage and reasonable accommodations on request. Emergency and safety plans specify ADA assistance responses. Our staff proactively accommodate needs with care and dignity.

Sexual Harassment: We enforce a zero-tolerance prevention policy. All employees, contractors, and volunteers receive mandatory onboarding and ongoing annual training in trauma-informed practices, sexual harassment prevention, and mandated reporting requirements. Complaints are investigated confidentially and promptly, and corrective action, including removal from site, is taken to ensure guest and staff safety.

Disqualified Individuals: Five Keys understands that certain individuals may be ineligible for placement at Lodi's Interim Housing Center due to legal restrictions (e.g., active restraining orders) or repeated behaviors that endanger community safety. We work with service providers to identify safe, lawful alternatives for individuals not eligible for onsite housing. Our team has experience coordinating referrals to address complex behavioral health needs, high-acuity conditions, or legal supervision requirements. Exclusions will be documented in Salesforce and communicated to the CES system to ensure that all guests receive requisite attention and alternative care.

20. Pet and Service Animal Accommodation

Describe your proposed policies for allowing and managing pets and service animals on-site.

Five Keys complies with ADA Title II and III requirements for service animals. Guests with trained service dogs are permitted entry regardless of housing status or documentation. Staff are trained to ask only legally permissible questions and avoid requesting medical proof of disability. Service animals are allowed in all areas open to the public and must remain under their handler's control at all times. For non-service animals, we understand the emotional and psychological support pets provide. We maintain a pet-inclusive approach when facilities and local policies support this, including: allowance of up to two pets per guest household (e.g. dogs, cats, rabbits); documentation about the pet (photos, behavioral checklist); expectations for control, supervision, vaccination, hygiene, and waste management; and collaboration with local service organizations to support access to food, crates, veterinary care, and licensing.

In Lodi, we will assess the appropriateness of pet sheltering in collaboration with City partners and adjust policies accordingly to ensure the safety and wellbeing of all guests and staff. Our goal is to reduce barriers to shelter access while maintaining a safe communal environment.

21. Grievance and Complaint Procedures

Outline your policies for receiving, reviewing, and resolving client grievances and complaints. Include your whistleblower policy.

Five Keys is committed to maintaining a safe, respectful, and transparent environment for all guests and staff. Our Guest Grievance Policy outlines a trauma-informed, confidential, and accessible process that empowers guests to express concerns, resolve issues, and contribute to the continual improvement of our services and shelter environment.

Procedures include:

Clear Communication: Grievance procedures are reviewed with each guest during intake and posted visibly throughout the facility. Policies are available in English and Spanish, and hard copies are kept at the front desk. Staff assist guests in filing a grievance, if support is needed.

Filing Process: Guests may submit grievances verbally or in writing. A supervisor will respond within two days to meet with the guest, listen to the concern, and work toward resolution. If unresolved, a formal written response or action plan will be provided within five business days.

Escalation: If the concern is not resolved at the supervisor level, the grievance is escalated to the Site Director, who will convene a meeting or investigation to resolve the issue. A final response is issued within five 5 business days of that review.

Confidentiality: All grievances are handled confidentially and shared only on a need-to-know basis. Five Keys strictly prohibits retaliation, and any retaliatory actions are subject to immediate disciplinary action.

Facilitated Resolution: When appropriate, facilitated meetings between guests and staff are arranged to address grievances in a supportive and constructive environment. These often help realign expectations and promote collaborative solutions.

Whistleblower Protection: Five Keys upholds a comprehensive Whistleblower Policy that enables staff, guests, and community members to safely report unethical, illegal, or unsafe behavior—including fraud, abuse, or policy violations—without fear of retaliation. Reports can be made anonymously. All complaints are investigated thoroughly and promptly; Whistleblowers are protected by internal policy and applicable law; Retaliation is prohibited and grounds for disciplinary action up to and including termination.

Continuous Improvement: Grievance data are reviewed regularly by program leadership to identify systemic issues, improve services, and inform staff training and accountability. This approach aligns with our broader values of dignity, accountability, and equity—ensuring that every guest concern is heard and addressed in a timely and respectful manner..

Policy procedures are attached as ***See Exhibit #9**

22. Incident Reporting and Documentation Policy

Outline your system for reporting, documenting, and following up on client and staff incidents (e.g., injuries, altercations, overdoses, critical behavioral health events).

Five Keys has a standardized incident reporting system to ensure the safety, accountability, and well-being of all guests, staff, and partners. Our procedures emphasize the importance of timely and efficient communication and documentation to adhere to local and state regulatory requirements.

Reporting: Incidents involving injury, altercations, overdoses, behavioral health crises, or threats to safety are reported immediately to a supervisor or site lead. Staff are trained to recognize incidents that require urgent escalation (medical emergencies, violence, or weapons possession) versus those that require internal documentation and follow-up (guest grievances, non-urgent behavioral issues). Incidents may be identified directly by staff, guest disclosure, by on-site partner providers, or via security system alerts (including cameras and Ambassador monitoring). *See **Exhibit #10**.

When emergencies occur, staff follow Five Keys' escalation protocol:

Level 1: Non-urgent concerns handled by frontline staff with supervisory review.

Level 2: Moderate incidents requiring site-level response and incident report.

Level 3: Critical incidents requiring immediate intervention, external response (e.g., EMS, law enforcement), and real-time notification to regional leadership via Five Keys' Emergency Communication Tree.

Law enforcement or emergency services are contacted when there is risk to life or serious injury, in accordance with pre-established site-specific protocol.

Documentation: Every incident is documented in Five Keys' centralized system within 24 hours of occurrence. Reports include: Date, time, and location; Individuals involved; Type and severity of incident; Immediate response actions taken; Names of staff witnesses or responders; and Follow-up actions or required next steps.

Reports are reviewed by the Site Director and elevated to regional leadership when appropriate. Patterns or repeated concerns are flagged for case conferencing and performance review. Five Keys uses Salesforce and HMIS to track participant-level outcomes and may log incident data if tied to services or guest care plans. All documentation complies with HIPAA standards and access is restricted to authorized personnel.

Follow-Up and Resolution: Within 72 hours of a documented incident, the Site Director or designee ensures that any required medical or mental health follow-up has been provided or referred; staff involved are debriefed and have on-site access to support, as needed; safety plans are updated for affected guests; and policy violations are addressed.

Significant or repeated incidents are reviewed in monthly risk management meetings and the lessons learned inform staff training, safety protocol updates, and system improvements. We check in on our staff to ensure sufficient and readily accessible support is available for whomever has been directly or indirectly impacted by trauma or triggering incidents.

Training and Accountability: All staff (including Ambassadors, Care Coordinators, and janitorial teams) receive incident reporting training during onboarding and annual refreshers. Training includes: de-escalation techniques; confidential documentation; when and how to involve police, fire, or medical responders; use of Narcan and trauma response; and mandated reporting guidelines for elder/dependent abuse or child endangerment. Practice exercises and drills are used to increase staff preparedness and promote calm and thoughtful responses. More information is found in ***See Exhibit #4.**

23. Emergency Preparedness and Response Plan

Describe your protocols for handling facility emergencies including:

- Medical emergencies
- Fire evacuation procedures
- Staff training on emergency drills

Five Keys will customize a comprehensive Emergency Preparedness and Response Plan to ensure the safety of guests, staff, and partners at the Lodi Access Center. Our protocols are adapted to fit the Lodi site context and staffing model.

Medical Emergencies: Staff are trained in CPR, first aid, and Naloxone (Narcan) administration. In the event of a medical emergency: Immediate care is administered by trained staff; 911 is called as needed following emergency protocol; The supervisor ensures the individual is stable and manages the area for guest and staff safety; and an incident report is filed within 24 hours and reviewed by leadership. Supervisors maintain updated emergency contacts and health-related protocols onsite, ensuring staff can respond quickly and effectively. Emergency kits, including AEDs and trauma supplies, are stocked and inspected regularly.

Fire Evacuation Procedures: Fire safety procedures include: Clearly marked emergency exits and evacuation routes throughout the building; Posted evacuation maps in common areas; Regular inspection of fire extinguishers and smoke alarms; Designated gathering zones outside the facility for roll call; Special attention given to guests in need of individual support; Supervisor-led drills conducted at least twice annually. Staff follow posted evacuation checklists and perform real-time guidance of guests to exits. Emergency lighting and accessible egress for mobility-impaired guests are part of the facility design.

Staff Training and Emergency Drills: All staff, including Ambassadors, Shift Supervisors, and Care Coordinators, receive training on: Emergency protocols during onboarding and through annual refreshers; De-escalation, trauma-informed care, and emergency mental health interventions; Specific roles and responsibilities in fire, medical, and behavioral emergencies; and Communication chains, including when to notify the City of Lodi or emergency services. Emergency drills are conducted semi-annually to test readiness. After-action reviews are conducted to assess response time, coordination, and adherence to protocols. Beyond training, Five Keys staff—most of whom have had traumatic lived experiences in their past—are known for their calm and clarity during emergencies. Five Keys' ambassador model ensures trained professionals are always on-site to respond immediately and maintain order. Emergency response roles are embedded into shift protocols, and supervisors are equipped to lead under pressure. These procedures ensure the Lodi Access Center operates as a safe, calm, and resilient facility—ready to respond effectively to any crisis.

24. Staff Training and Development

Detail required staff training (e.g., trauma-informed care, de-escalation, cultural competency, CPR/First Aid, confidentiality). Include any ongoing professional development or certification requirements.

Five Keys' list of trainings for housing staff is attached as ***See Exhibit #4**, including:

Behavioral Health / Harm Reduction Training:

- Motivational Interviewing: All staff are trained in this evidence-based approach to encourage guest engagement and goal-setting. Advanced sessions are required for care coordinators.
- Trauma-Informed Care (101 & 102): All staff receive foundational and advanced training on trauma responses, reducing re-traumatization, and creating healing-centered environments.
- Harm Reduction / Overdose Response: Trainings include overdose education, Narcan administration, and how to support guests who are using substances without judgment; and biohazard and sharps disposal.
- Mental Health & Substance Use 101: Care Coordinators attend training on mental health disorders, co-occurring conditions, and how to navigate behavioral health systems.
- Mental Health First Aid: For all team members to recognize and respond to crises effectively and compassionately.

Crisis Intervention

- De-escalation Techniques: Required annually for all staff, this training covers communication strategies, boundary setting, and conflict resolution in congregate and drop-in settings.
- Crisis Response/Safety Protocols: Shelter teams rehearse emergency procedures regularly and are trained in situational awareness, emergency medical interventions, and fire-watch patrols.

Compliance Training

- Professional Standards: Annual training includes workplace ethics, shelter conduct, dress code, and customer service expectations.
- Policies & Procedures: All staff are trained on Five Keys' protocols, including emergency response, grievance procedures, pet/service animal policies, visitor protocols, and Good Neighbor commitments.
- OSHA, Safe Food Handling, Infection Control: Janitorial and Ambassador staff complete OSHA 10 and hygiene trainings. Staff responsible for food service receive training in safe handling, while all staff receive instruction in sanitation protocols, disease transmission, and emergency health procedures.
- HMIS: Care coordinators and supervisors learn HMIS data entry for intakes, service notes, document uploads, and exits, in compliance with HUD and local CoC requirements.

Cultural Responsiveness/Equity

- Cultural & Gender Awareness: Trainings address anti-oppression, implicit bias, LGBTQ+ inclusion, and sensitivity to specific needs of transgender guests, non-English speakers, and individuals with disabilities.
- ADA Accommodations: Supervisors and directors are trained to identify when accommodations are needed and how to implement them in compliance.
- Denials of Service: Directors and shift leads receive training on how service limitations or discharges can occur while protecting guest rights.

Staff Retention

- Restorative Justice Circles: All staff are invited to biweekly sessions led by senior leadership to process stress, resolve conflict, and build team cohesion.
- "Good Soil" Leadership Training: Voluntary 6-month cohort for emerging leaders on communication, emotional intelligence, and team building
- Self-Care: Staff access wellness challenges, grief counseling, and on-demand trauma support to prevent burnout and promote retention in high-stress roles.

Targeted Training

- Case Management: Care Coordinator managers are trained in a 3-tiered system (Case Management 1, 2, and Care Coordination 3) based on tenure.
- Activities Coordination: Enrichment programs support group facilitation, peer support, and responding to diverse guest interests and identities.
- Janitorial and Maintenance: Site-specific protocols on sanitation, hazard disposal, and universal precautions to maintain ADA-compliant, safe environments.

25. Internal Monitoring and Quality Assurance

Explain how your organization monitors service delivery quality, ensures compliance with regulations and funder requirements, and uses data to drive performance improvement.

Five Keys has a dedicated Quality Assurance Director to monitor our compliance with contractual requirements across all housing programs and operations. We invest in staff training and professional development; data system upgrades, and feedback instruments to continually learn from stakeholders across our housing ecosystem. We have high expectations of staff regarding data integrity, fidelity to program standards, and transparency in communications. We cultivate safety and trust so that staff share their direct experiences with confidence that Five Keys values their insights so we can continually learn, improve, and achieve better outcomes in all aspects of services, staffing, data, and site operations.

Our internal data platform (Salesforce) allows us to track every aspect of engagement, outreach, intakes and exits, guest service plans, partner referrals, barrier removal, and resulting outcomes. We are able to disaggregate client data to analyze our efforts and guide future resource allocation, policy adjustments, and program improvements.

Daily Oversight: Each site has a designated Site Director, Shift Supervisors, and Ambassadors who conduct daily walkthroughs, monitor services, and ensure all safety, cleanliness, and behavioral standards are upheld. Supervisors hold daily shift debriefs and confirm completion of core tasks (bed logs, meal distributions, supply checks, etc.). Incident reports and unusual occurrences are logged and reviewed by management within 24 hours. Data related to intakes, exits, outreach, engagement, and referrals is entered into HMIS and Salesforce within 24 hours, and reviewed weekly by leadership.

Weekly Reviews and Service Audits: Data is regularly analyzed to identify successes and areas for improvement. Ambassadors, Care Coordinators, and Supervisors work together at weekly meetings to focus on care coordination, barriers to housing, and guest progress.

Quarterly Compliance Checks: The Quality Assurance Director looks at targeted vs actual outcomes: alignment with contractual service levels; data entry (timeliness, accuracy, completeness); incident management; health and safety protocols; staff training; and facilities maintenance standards. Walkthrough checklists and file audits are shared with supervisors and tracked to resolution. Coaching and retraining are provided as needed.

Improvement Loops: Feedback is collected through guest surveys (twice yearly); anonymous comment cards; and through scheduled and impromptu check-ins. Guest feedback is gathered about quality of services, sense of safety, and facility amenities. What we learn informs training priorities that reinforce our guest-centered approach.

Metrics and Reporting: Leadership analyzes key performance indicators (KPIs) including: Bed utilization and turnover; Average length of stay; Transition to housing; Service engagement rates; Critical incidents' resolution timelines; and more. Reports are shared with appropriate partners and stakeholders. We also conduct after-action reviews and debriefings after serious incidents to determine if staff need support, and to share learnings and refine protocols across all sites.

Ongoing Training: Policies and Procedures are formally reviewed and updated by leadership annually and throughout the year. Staff complete initial onboarding, update trainings, and regular guidance on compliance with data security protocols. Trainings are tracked in Paycom and reminders are made during supervisory reviews and audits. This structured, multilayered approach ensures that Five Keys maintains compliance, transparency, and data security across all levels of the organization.

26. Confidentiality, Client Records, and Data Security

Describe your policies and practices for maintaining and safeguarding client records, ensuring HIPAA and HMIS compliance, managing data sharing with partners, and responding to potential breaches.

Five Keys places the highest priority on protecting confidentiality and safeguarding all personal, medical, and identifying information in full compliance with HIPAA, HMIS, and local, state, and federal regulations. Our policies and protocols are reviewed and updated regularly to align with the most current best practices and we ensure that all staff are trained accordingly.

Client Record Management: All guest data is recorded in secure systems that protect against unauthorized access or disclosure. Depending on the program area, data is entered into HMIS (Homeless Management Information System), per HUD and San Joaquin County requirements; and Salesforce, Five Keys' internal CRM for cross-site case coordination and outcomes tracking. Physical paperwork is stored in locked cabinets in restricted-access areas. Digital records are protected with multi-level access controls, and only authorized staff may view or edit sensitive data. Access levels are assigned based on role and function, and all logins are time-stamped and audit-tracked.

HIPAA and HMIS Compliance: Staff receive annual training on HIPAA and HMIS data entry protocols, consent requirements, and how to handle sensitive disclosures (e.g., HIV status, behavioral health needs). Attendance at trainings is logged and refresher sessions are scheduled whenever there are updates to regulatory policy. Information about medical, mental health, or substance use is not disclosed without explicit written authorization unless legally mandated. Guests are informed of their rights to view, amend, or revoke consent for their records at any time.

Data Sharing: When collaborating with partner agencies, Five Keys ensures that only the minimum necessary information is shared, in alignment with guest consent agreements. Signed ROI forms are obtained during intakes to document these limited permissions. Cross-agency communication involving personal data is handled through encrypted email, secure portals, or in-person conversation with proper release of information in place.

Data Breaches: Five Keys maintains a Data Breach Protocol that includes: Immediate notification of Five Keys' Privacy Officer and Executive Leadership; Investigation and containment of the breach (e.g., disabling user access, recovering lost files); Notification of affected individuals in accordance with HIPAA and state data breach laws; Corrective action plans and additional staff training to prevent recurrence; and Incident logging and root cause analysis to report to oversight bodies as required. All suspected or confirmed breaches are documented and follow-up actions are reviewed during monthly quality assurance meetings.

Health Information Compliance: Policies related to the collection and handling of health-related information are aligned with CDC, CDPH, and San Joaquin County Public Health guidance and protocols. Regional COVID-19 protocols (optional masking, symptom screening, isolation procedures) are reviewed and adapted as necessary.

Transparency and Accountability: Five Keys' commitment to data security is part of our broader accountability to clients, funders, and the community. We conduct internal audits, participate in funder-led monitoring visits, and uphold clear grievance processes so guests may voice concerns without retaliation. By embedding confidentiality and security into every layer of operations from intake to exits, Five Keys ensures that guests feel safe, respected, and in control of their personal information at all times.

27. City and County Partner Coordination

Describe how your organization will maintain communication and coordination with City staff and County Partners to support the successful operations of the Access Center.

Five Keys is committed to working in full partnership with the City of Lodi, San Joaquin County agencies, and community stakeholders to ensure the Access Center meets the City's objectives and operates as a collaborative, coordinated, and accountable resource for residents experiencing homelessness.

We will designate a Site Director responsible for direct coordination with the City's Homeless Services Manager and other designated staff. This role will serve as the primary point of contact for operational updates, problem-solving, and real-time response to emergent needs.

To ensure alignment and transparency, we will schedule regular standing meetings (biweekly or monthly) with City and County staff to review program performance, address barriers, and co-develop solutions.

Five Keys' collaborative philosophy is rooted in our experience developing relationships with a wide variety of agencies across 15 counties in California. We understand that local priorities vary and that ongoing communication, transparency, and flexibility are critical to maintaining a successful partnership. We will bring this institutional knowledge and respectful, responsive posture to our work in Lodi. To support broader system coordination: We will attend interagency coordination meetings, regional case conferencing, and partner briefings led by the City, County, or Continuum of Care (CoC); We will ensure data sharing and reporting to the City and County is timely, accurate, and aligned with contractual and policy requirements; and our team will be available for urgent coordination needs, such as law enforcement-assisted referrals and encampment resolutions. Extreme weather. covid/ responsive, will collaborate with city's leadership to be a good partner in the event of unexpected, extreme weather, special circumstances.

In all interactions, we will engage City and County stakeholders with respectful partnership and uphold high standards for responsiveness. We recognize the high visibility of this program and are committed to upholding the City's trust through excellence in service delivery and interagency collaboration.

28. Data Collection and Reporting

Explain the methods used to collect and track demographic and service data, including the software system(s) used for reporting.

Five Keys uses a secure, policy-driven approach to client data collection and reporting, combining real-time tracking with rigorous compliance. For the Lodi Access Center, we will utilize Salesforce Nonprofit Cloud for internal service delivery and care coordination management, and will coordinate with the San Joaquin Continuum of Care's designated HMIS platform to ensure alignment with local, state, and federal requirements.

Systems and Information: Salesforce serves as an encrypted, cloud-based repository for client data including: Demographics (age, race, gender, veteran status, etc.); Housing status and barriers; Education, income, and employment benchmarks; Case notes, assessments, and individualized service plans; and Consent forms, grievances, and critical incident documentation. In parallel, all required data elements will be entered into the CoC's HMIS in accordance with HUD standards. This dual-system approach enables program staff to manage client engagement holistically while ensuring funder reporting is consistent and timely.

Data Integrity and Monitoring: We maintain a layered quality control process: Frontline staff enter and update data in real-time; Care Coordinators and Supervisors conduct weekly data reviews; and Program Directors oversee monthly audits. Our central data team performs cross-platform validation, ensuring consistency between Salesforce and HMIS records. Automated workflows and dashboards in Salesforce alert staff to key milestones (e.g., re-assessments, case plan updates, exit interviews), helping ensure service continuity and data completeness.

Confidentiality and Security: All data is stored in SOC 2 Type II–certified platforms with strict access controls. Medical and mental health records are safeguarded in accordance with HIPAA, and all entries involving protected health information (PHI) are only accessible to authorized personnel. Staff are trained to: Access only data required for their role; Log out when leaving devices unattended; Use encrypted Five Keys-managed equipment; and Report any suspected breaches immediately. Sensitive data is transmitted using encrypted tools (e.g., Virtru) and not stored on personal devices. Our Data and Acceptable Use Policy governs employee access and sets consequences for misuse.

External Reporting and Partner Coordination: All external data sharing, including with the City of Lodi, San Joaquin County, and Coordinated Entry, is conducted with client consent, in alignment with CoC data sharing agreements. Reports are exported securely and customized to funder specifications. Any physical records are stored in locked cabinets or securely shredded when no longer required.

Continuous Improvement: Data is used to drive program refinement: Biannual guest satisfaction surveys inform service and facility adjustments; Disaggregated data reveals any gaps in access; and HR systems track staff training on data security.

Five Keys' commitment to data transparency, client confidentiality, and cross-agency coordination ensures that Five Keys will be compliant as well as responsive to evolving needs of the Lodi Access Center.

29. CalAIM Medical Respite Experience

If applicable, describe your organization's experience providing Medical Respite services under CalAIM, either directly or through a subcontractor relationship. In your response, please include:

- A summary of your Medical Respite program(s), including scope of services and target populations
- Whether services were provided directly or through a subcontractor
- The number of clients served annually and typical length of stay
- Coordination protocols with managed care plans (MCPs), hospitals, or referring entities
- Outcomes tracked and reported (e.g., discharge destinations, health stabilization, hospital readmission rates)
- Billing and reimbursement experience under CalAIM, including familiarity with Department of Health Care Services (DHCS) standards and reporting requirements
- How this experience would inform your organization's ability to implement Medical Respite services at the Access Center, if selected
- If your organization is not interested in operating any Medical Respite services as potential cost offset, please clearly state that in your response

At this time, Five Keys is not seeking to operate Medical Respite services or pursue bed reimbursement under CalAIM. Our focus for this application is on Lodi's core Access Center operations, outreach, and supportive services. That said, we recognize the sustainability potential of the CalAIM reimbursements and should Five Keys be selected as the operator in Lodi, we would continue to deepen partnerships with medical providers; advance CalAIM training for our staff; and strengthen our billing infrastructure for CalAIM-aligned Medical Respite services in the future.

VI. PROPOSED BUDGET

An excel version of the budget is provided in the attached thumb drive of the complete proposal.

BUDGET ASSUMPTIONS & EXPLANATIONS:

Five Keys based our proposed budget on the following assumptions:

We will be prepared to have the Lodi Access Center Emergency Housing site ramped up to full capacity **within the first two weeks of operation.**

In the event that the ramp up takes longer, due to the volume of referrals to the site, we have adjusted the budget to reflect that possibility.

Accounted for in the budget are separate line items for incumbent shift supervisors and housing ambassadors (highly experienced with years of service and therefore at higher salaries, compared to salaries of new hires from the local job market pool.)

Expense Clarifications (during ramp up period)	Details	Period
Care Coordinators	2.0 FTE	First 6 months
Janitors	1.4 FTE	First 6 months
Food	for 45 guests	First 3 months
Transportation	for 45 guests	First 3 months

Economies of Scale

As the Lodi Access Center increases occupancy, the budget benefits from significant economies of scale. Many operational expenses, such as security, on-site supervision, staff training, oversight, technology infrastructure and facility overhead remain relatively fixed, regardless of the number of guests served. As occupancy increases, these fixed costs are distributed across a greater number of beds, resulting in a substantially reduced per-bed cost.

For example, at an initial capacity of **60 beds**, the per-bed annual cost is approximately **\$40,597**. However, as additional **flex beds** are added, these shared costs are spread more efficiently, reducing the per-bed annual rate to **\$9,791** per additional bed at full capacity, based on the 5-year average cost. This scaling effect allows the City of Lodi to realize meaningful cost savings while maintaining consistent service quality and staffing coverage.

Cost Savings and Funding Offsets

Five Keys brings meaningful cost-efficiency through our regional infrastructure, integrated services, and leveraged partnerships, deploying a variety of cost-saving strategies. With housing programs statewide, we are able to scale operations without building a separate administrative structure. Our centralized HR, finance, data, compliance, and training allows for faster implementation.

We regularly secure contributions such as hygiene supplies, food, pet care items, and technology through our network of community partners and corporate outreach. As local opportunities emerge in Lodi, we will work with partners and volunteers to identify and procure supplemental supplies and quantify the value in our outcomes tracking metrics.

Our Stockton programs offer transitional employment opportunities for justice-involved individuals, job readiness resources, digital literacy, and life skills workshops. These assets may be extended to Lodi Access Center guests at no additional cost, depending on the City's priorities and individuals' needs. Our Stockton-based staff will also be leveraged to assist with donation pickups and deliveries to Lodi.

In addition, Five Keys frequently leverages our existing services in education, workforce development, reentry support, and behavioral health. For example, we can offer adult high school diplomas and GED completion remotely, as well as remote access to job readiness and career training certificate programs, supported by access at an on-site technology station.

While we leverage Five Keys' programs, we take care to not supplant local activities provided by service providers in Lodi.

FIVE KEYS 5-year budget proposed for LODI Access Center and Emergency Shelter Budget 11.03.25

Five Keys Schools and Programs p.2													
Office Supplies, Postage, and Administrative Expenses	Operating	General Admin Fee	\$ 7,500.00	1.00	\$ 1,875.00	\$ 5,625.00	\$ 7,725.00	\$ 7,956.75	\$ 8,195.45	\$ 8,441.32	\$ 39,818.52	Estimated cost of \$900-950/month	1:10 Ratio
Landscape Maintenance	In-Kind Donations	Zero Admin Fee	\$ 3,600.00	1.00	\$ 900.00	\$ 2,700.00	\$ 3,708.00	\$ 3,819.24	\$ 3,933.82	\$ 4,051.83	\$ 19,112.89		Fixed
Insurance	Operating	General Admin Fee	\$ 5,185.00	1.00	\$ 1,296.25	\$ 3,888.75	\$ 5,340.55	\$ 5,500.77	\$ 5,665.79	\$ 5,835.76	\$ 27,527.87	Required property, liability and additional coverage needed for site.	Fixed
Employee Training and Development	Operating	General Admin Fee	\$ 6,450.00	1.00	\$ 1,612.50	\$ 4,837.50	\$ 6,643.50	\$ 6,842.81	\$ 7,048.09	\$ 7,259.53	\$ 34,243.93	Based on annual expenditure data from comparable sites. Reflects typical costs for similar services. Training incl CPR/first-aid, Narcan, de-escalation techniques, etc.)	1:20 Ratio
Technology and Equipment	Operating	General Admin Fee	\$ 10,500.00	1.00	\$ 5,925.00	\$ 7,875.00	\$ 10,815.00	\$ 11,139.45	\$ 11,473.63	\$ 11,817.84	\$ 59,045.93	Est. \$1,100/mo: WiFi(\$600), Cable(\$300), Phone(\$200) Laptops,software, copiers, etc	Fixed
Janitorial and Laundry Supplies	Operating	General Admin Fee	\$ 8,400.00	1.00	\$ 2,100.00	\$ 6,300.00	\$ 8,652.00	\$ 8,911.56	\$ 9,178.91	\$ 9,454.27	\$ 44,596.74	Based on annual expenditure data from comparable sites. Reflects typical costs for similar services: Estimated at \$700/month	1:10 Ratio
Staff Supplies	Operating	General Admin Fee	\$ 8,325.00	1.00	\$ 2,081.25	\$ 6,243.75	\$ 8,574.75	\$ 8,831.99	\$ 9,096.95	\$ 9,369.86	\$ 44,198.56	Essential staff supplies (radios, uniforms, badges, PPE, flashlights, etc.)	1:20 Ratio
Neighborhood Clean-Up and Good Neighbor Engagement Supplies	Operating	General Admin Fee	\$ 12,000.00	1.00	\$ 3,000.00	\$ 9,000.00	\$ 12,360.00	\$ 12,730.80	\$ 13,112.72	\$ 13,506.11	\$ 63,709.63	Bags, tools, safety gear for engagement staff	Fixed
Outreach Expenses	Operating	General Admin Fee	\$ 7,200.00	1.00	\$ 1,800.00	\$ 5,400.00	\$ 7,416.00	\$ 7,638.48	\$ 7,867.63	\$ 8,103.66	\$ 38,225.78	Bus passes, hygiene kits, gloves, resource materials	Fixed
Food and Meal Expenses	Operating	General Admin Fee	\$ 6,205.00	60.00	\$ 69,806.25 [5]	\$ 279,225.00	\$ 383,469.00	\$ 394,973.07	\$ 406,822.26	\$ 419,026.93	\$ 1,953,322.51	3 meals per day for guests (on-site commercial kitchen). Estimated at \$7/meal	1:1 Ratio
Guest Supplies	Operating	General Admin Fee	\$ 42,450.00	1.00	\$ 10,612.50	\$ 31,837.50	\$ 43,723.50	\$ 45,035.21	\$ 46,386.26	\$ 47,777.85	\$ 225,372.82	Based on annual expense data from comparable sites. Reflects typical costs. Covers supplies for guests (hygiene, clothing, activities, etc.) Est. \$7125/mo	1:10 Ratio
Laundry Machine Repair &Service	Operating	General Admin Fee	\$ 3,600.00	1.00	\$ 900.00	\$ 2,700.00	\$ 3,708.00	\$ 3,819.24	\$ 3,933.82	\$ 4,051.83	\$ 19,112.89	Laundry equipment rental and/or service Estimated at \$1000/month	1:10 Ratio
Transportation Costs	Operating	General Admin Fee	\$ 600.00	60.00	\$ 6,750.00 [6]	\$ 27,000.00	\$ 37,080.00	\$ 38,192.40	\$ 39,338.17	\$ 40,518.32	\$ 188,878.89	Estimated at \$50/month per guest	1:1 Ratio
Cost Savings													
In-kind donations (e.g., food)	In-Kind Donations	Zero Admin Fee	\$24,000.00	1.00	\$ 6,000.00	\$ 18,000.00	\$ 18,000.00	\$ 18,000.00	\$ 18,000.00	\$ 18,000.00	\$ 96,000.00	food donations, snacks, meals, food bank	Fixed
In-kind donations (e.g., guest supplies, equipment)	In-Kind Donations	Zero Admin Fee	\$108,000.00	1.00	\$ 27,000.00	\$ 81,000.00	\$ 108,000.00	\$ 108,000.00	\$ 108,000.00	\$ 108,000.00	\$ 540,000.00	hygiene, cosmetics, clothes,	
Volunteer labor (estimates FTE, even if no cost is incurred)	In-Kind Donations	Zero Admin Fee	\$52,000.00	2.00	\$ 26,000.00	\$ 78,000.00	\$ 104,000.00	\$ 104,000.00	\$ 104,000.00	\$ 104,000.00	\$ 520,000.00	groups, activities, landscaping, book club, N/A, AA meetings	Fixed
Community partnerships	In-Kind Donations	Zero Admin Fee	\$50,000.00	1.00	\$ 12,500.00	\$ 37,500.00	\$ 50,000.00	\$ 50,000.00	\$ 50,000.00	\$ 50,000.00	\$ 250,000.00	workforce & job readiness training, transportation, re-entry support, tattoo removal, transitional employment	Fixed
					Year 1 Amount Start-up Phase (Personnel & Operating)	Year 1 Amount 60 bed occupancy (Personnel & Operating)	Year 2 (Personnel & Operating)	Year 3 (Personnel & Operating)	Year 4 (Personnel & Operating)	Year 5 (Personnel & Operating)	Total (Personnel & Operating)		
Subtotals					\$ 624,155.81	\$ 1,783,538.34	\$ 2,568,648.20	\$ 2,637,319.86	\$ 2,708,054.15	\$ 2,780,904.28	\$ 13,102,620.64	<= Does not include overhead (row 17)	
General Admin Fee (15% Indirect)					\$ 82,898.37	\$ 235,355.75	\$ 342,744.00	\$ 342,846.54	\$ 353,133.50	\$ 363,728.32	\$ 1,720,706.48		
Totals					Year 1 Total >>	\$ 2,725,948	\$ 2,911,392	\$ 2,980,166	\$ 3,061,188	\$ 3,144,633	\$ 14,823,327		

Thank you for considering Five Keys' application to operate emergency housing services on behalf of the City of Lodi and its residents.



INTEGRATED SUPPORTIVE SERVICES and PROPERTY MANAGEMENT OPERATIONS

Location	Program Type	Units/Beds	Site-Specific Roles		County
Vallejo Navigation Center 1937 Broadway St Vallejo, CA 94589	NAVIGATION CENTER Sprung building. Outdoor community area, dog area, gym area	125 Congregate	Assistant Director: Que M 4.2 Shift Supervisors 3 Care Coordinators 1 Intake Coordinator	1 Activity Coordinator 0.25 Maintenance Crew 4.2 Janitors 18 Ambassadors	Solano
Embarcadero SAFE Navigation Center 555 Beale Street San Francisco, CA 94105	NAVIGATION CENTER Sprung building. Outdoor community area, dog area, gym area	200 Congregate	2 Assistant Dir: Demian J; Roozbeh I 4.2 Shift Supervisors 8 Care Coordinators 1 Intake Coordinator	1 Activity Coordinator 33 Ambassadors 5 Janitors	San Francisco
Bayshore Navigation Center 125 Bayshore Blvd. San Francisco, CA 94124	NAVIGATION CENTER Sprung building. Outdoor community area, dog area, gym area	128 Congregate	2 Assistant Dir: Sierra K; Samyra M 4.2 Shift Supervisors 5 Care Coordinators 1 Intake Coordinator	1 Activity Coordinator 21 Ambassadors 5 Janitors	San Francisco
Central Waterfront Navigation Center 600 25th Street San Francisco, CA 94121	NAVIGATION CENTER Sprung building. Outdoor community area, dog area, gym area	65 Congregate no doubles	1 Assistant Director: Torbio D 4.2 Shift Supervisors 3 Intake & Care Coord.	15 Ambassadors 2 Janitors	San Francisco
Baldwin Hotel 74 6th Street San Francisco, CA 94103	NAVIGATION CENTER SAFE Navigation Center shelter NON-congregate	200 Individual Rooms Non-Congregate	Assistant Dir: Cyrus A; Dawn M Property Manager: Roy A 4.2 Shift Supervisors 5 Care Coordinators 1 Intake Coordinator	1 Activity Coordinator 2 Maintenance Crew 36 Ambassadors 6 Janitors	San Francisco
Arroyo Seco Tiny Home Village 401 Arroyo Seco Pkwy, Los Angeles, CA 90042	TRANSITIONAL HOUSING 115 TINY HOMES	123 beds	Assistant Director: Eric S 4.2 Shift Supervisors 1 Care Coord. Supervisor 4 Care Coordinators	1 Maintenance 18 Ambassadors	Los Angeles
Mission Cabins 1979 Mission Street San Francisco, CA 94103	TINY HOMES SHELTER local neighborhood 90% Spanish-Speaking	63 Individual Rooms 8 double beds	Assistant Director: Inez G 4.2 Shift Supervisors 2 Care Coordinators/Intake	18 Ambassadors 2 Janitors	San Francisco
Next Door Shelter 1001 Polk Street San Francisco, CA 94109	INTERIM SHELTER plus: EXTREME WEATHER SHELTER 4 floors + kitchen, library	334 Congregate no doubles	Asst. Director: Samantha E 8.4 Shift Supervisors 9 Care Coordinators 2 Intake Coordinators	1 Activity Coordinator 70 Ambassadors 10 Janitors	San Francisco
Adante Hotel 610 Geary Street San Francisco, CA 94102	INTERIM NCS SHELTER NCS=Noncongregate	89 Individual Rooms or doubles	Assistant Director: Hun S Property Manager: Osbaldo S 4.2 Shift Supervisors 1 Care Coordinator 1 Intake Coordinator	32 Ambassadors 2 Janitors	San Francisco

Location	Program Type	Units/Beds	Site-Specific Roles		County
Ellis St 685 Ellis Street San Francisco, CA 94109	INTERIM NCS SHELTER Unaffiliated Individuals share as roommates.	72 double rooms 150 total beds	Assistant Director: Eldridge C Property Manager: Robert W 4.2 Shift Supervisors 4 Care Coordinators	1 Intake Coordinator 1 Maintenance Crew 48 Ambassadors 2 Janitors	San Francisco
Eddie's Place 170 Hegenberger Loop Oakland, CA 94621	MEDICAL RESPITE SHELTER We provide operations support, incl. security and Ambassador work	76 Individual Rooms (up to 90 days)	Director: Brandi T 4.2 Shift Supervisors 8 Ambassadors	Partnering with CARDEA HEALTH for medical care (Five Keys - subcontractor)	Alameda
Home Free, Treasure Island 1431 Halibut Court San Francisco, CA 94130	INTERIM REENTRY HOUSING Adult Reentry DV survivors	10 5 shared apartments for stays up to 1 year	Program Director: Tammy C Assistant Director: Gilda S 1 Care Coordinator	4 Ambassadors 1 Reentry Coach	San Francisco
OakDays 8350 Edes Avenue Oakland, CA 94621	PERMANENT SUPPORTIVE HOUSING (PSH) Medically fragile tenants.	140 >> 70 Individual Rooms or doubles	Property Manager: Natalie L 1 Care Coordinator 3 Housing Navigators 2 Janitors	Partnering with CARDEA HEALTH for medical care 0.75 Maintenance Crew 24 Ambassadors	Alameda
42 Otis 42 Otis Street San Francisco, CA 94103	PERMANENT SUPPORTIVE HOUSING (PSH) 100% Transitional Age Youth	24 Individual or double rooms	Property Manager: Donald S. 1 Care Coordinators 1 Peer Coordinator	1 Maintenance Crew 10 Ambassadors 1 Janitor	San Francisco
Artmar Hotel 433 Ellis Street San Francisco, CA 94102	PERMANENT SUPPORTIVE HOUSING (PSH) 90% Transitional Age Youth	60 Individual Rooms	Property Manager: Eduardo G 2 Care Coordinators	1 Maintenance Crew 8 Ambassadors 1 Janitor	San Francisco
Gotham /Vantaggio Suites 835 Turk Street San Francisco, CA 94102	PERMANENT SUPPORTIVE HOUSING (PSH) Adult High-needs populations	114 >> 108 Individual Rooms or doubles	Property Manager: Donald S 4 Care Coordinators	1 Maintenance Crew 11 Ambassadors 1 Janitor	San Francisco
San Francisco Homelessness and Supportive Housing (HSH) Rapid Rehousing Community Support San Francisco, CA	SCATTERED SITE HOUSING	154 served last year	Program Manager Housing Stability: Bianca F Rehousing Acquisition Manager: Rakie H Rehousing Coordinator Assistant Director of TAY Rapid Rehousing 5 Tay Supportive Services Care Manager 5 Supportive Services Care Manager		San Francisco
Emergency Stabilization Units Department of Public Health San Francisco, CA	EMERGENCY STABILIZATION UNITS (ESUS) Short-term post hospital jail in SRO's	188 served last year	Assistant Director of Care Coordination: Dana P Licensed Clinical Social Worker 5 Care Coordinators 1 Clinical Care Supervisor		San Francisco
Health Care Services Agency Housing Community Supports (HCSA) Alameda, CA	Housing Community Supports Tenancy Sustaining Services & Housing Navigation & Housing Deposits	66 served last year	Assistant Director of Care Coordination: Dana P 4 Housing Navigators		Alameda



Housing Division Org Chart

August 2025



Antonette West, CFO

Anthony Wong
Assistant Director of Finance

Patricia Richard
Billing / Fiscal Compliance

Gabriela Farias
Director of Technology

Lisa Haynes
VP of Training & Development

Mary Vigil, Chief HR Officer

Fausto Perez
Assistant Director of HR

Dureana Murphy
HR Business Partner

Rita Alfred
Restorative Justice Strategist
Staff Wellness Crisis Response Facilitator

Dana Pine
Assistant Director of Care Coordination

Nicholas Himan, Jassy Mopera, Craig Neely;
Rocky Nguyen; Jacob Valenzuela
5 Supervisors of Care Coordination

43 Care Coordinators (Case Managers)

4 Housing Navigators
Housing Community Supports

Emergency Shelter Units
1 Clinical Care Supervisor
5 Care Coordinators

Dorick Scarpelli
VP of Programs & Partnerships

Alex Guzman-Ramos
Director of Rehousing Programs
Scattered Site Housing

26 Case Managers for Adults and TAY

Tammy Cooper-Garvin,
Program Director, Home Free

Assistant Director, **Gilda Serano**

Case Manager	4	Reentry Coach
	Ambassadors	

14 Site Directors and Assistant Site Directors:
Brandi T, Cyrus A, Dawn M, Demian J, Eldridge C, Eric S, Hun S, Inez G, Roozbeth I, Sally E, Samantha E, Samyra M, Sierra K, Torbio D

5 Property Managers: Donald S, Eduardo G, Natalie L, Oswaldo S, Robert W, Roy A

60 Shift Supervisors
93% of Directors, Assistant Directors, and Shift Supervisors have been promoted from within.

11 Intake Coordinators – 5 Activity Coordinators – 35 Janitorial Crew – 7 Maintenance

374 Housing Ambassadors
Cross-trained as Site Security, Fire Monitors, Neighbor Relations, Harm-Reduction Wellness checks; Housekeeping (turn-overs); Pet Controls; Food Distribution, and All-Around Customer Service Liaisons



Proposed Staffing Org Chart LODI ACCESS CENTER November 2025



- Antonette West, CFO
- Mary Vigil, Chief HR Officer
- Lisa Haynes, VP of Training & Development
- Gabriela Farias, Director of Technology

Dana Pine
Director of Care Coordination

3 FTE LODI Care Coordinators
(Housing Focused Case Managers)

4.2 FTE
LODI Janitorial

12.6 FTE LODI Housing Ambassadors
Site Security, Fire Monitors, Harm-Reduction Wellness checks; Housekeeping (turn-overs); Pet Controls; Food Distribution, & Customer Service Liaisons

2.8 FTE LODI Community Ambassadors
Perimeter checks, community engagement, emergency response; Goodwill stewards with local residents and businesses per the Good Neighbor Policy.

These are the same staffing group, performing different functions at different times. FTE are listed separately for tracking purposes.

FIVE KEYS STAFFING PLAN FOR LODI ACCESS CENTER AND EMERGENCY SHELTER OPERATIONAL MANAGEMENT SERVICES

Position / Role	FTE	Primary Responsibilities
Housing Division Director Brandi Marshall	0.3 FTE	Oversees all housing operations: sites, services, compliance, and accountability. Provides direction on policies, procedures, contract outcomes, fidelity and budget compliance.
Deputy Director of Housing Services Kimberly Duong	0.03 FTE	Oversees all housing operations, including sites, services, compliance, and accountability. Provides direction on policies, procedures, contract outcomes and budget compliance.
Director of Housing Operations Alysha Galindo	0.03 FTE	Responsible for writing policies, administrative documentation support, and intellectual property. Ensures data compliance and assists in tracking, compliance, and reporting.
Director of Staff and Guest Support Jamil Wilson	0.03 FTE	Trains new hires and provides guest support. Conducts grievance processes, investigations, and client responses. Ensures guests receive dignified treatment and excellent customer service. Supervises the Activities Coordinator and resolves guest complaints.
Director of Compliance and Quality Assurance Samantha Evans	0.03 FTE	Ensures that all housing site operations align with contractual and internal policies through consistent on-site monitoring and intervention. Leads quality improvement initiatives by addressing operational challenges, implementing corrective actions, and using data (grievances and DOS) to reduce service disruptions and enhance program delivery.
Training and Community Engagement Manager TBD	0.03 FTE	Ensures staff are equipped to deliver high-quality, client-centered, and trauma-informed services through on-site coaching and hands-on support. Oversees all staff training, tracking compliance, and systems to ensure full participation. Fosters strong community relationships and engagement efforts incorporating feedback from clients and stakeholders
Director Care Coordinators Dana Pine	0.03 FTE	Accountable for smooth operations and effective coordination with our city partners
Site Director Brandi Taliano	0.50 FTE	Responsible for on-site program services, client satisfaction, and staff training/supervision. Liaison to housing leadership; oversees day-to-day operations.
Care Coordinators TBD	3.0 FTE	Build rapport with guests through intakes, assessments, and strengths-based interviews. Assist guests in co-creating care plans and setting SMART goals for stable housing. Help guests acquire necessary documents and apply for benefits (SSI/SSDI, Medi-Cal, CalFresh, General Assistance, unemployment). Provide referrals to healthcare, recovery programs, education, job training, and employment opportunities. Promote wellness activities and prepare guests for successful transitions to stable housing.

Position / Role	FTE	Primary Responsibilities
Shift Supervisors	4.2 FTE	Manages shift scheduling, emergency procedures, guest issues, and de-escalation strategies. Ensures overnight intakes are conducted efficiently. Oversees shift activities, staffing, safety, emergency response, and client satisfaction. Trains staff and maintains accountability.
Housing Ambassadors and Community Ambassadors <i>Housing Ambassadors and Community Ambassadors are the same people, performing different functions at different times. The FTE are listed separately for tracking and budgetary purposes.</i>	12.6 FTE ----- 2.8 FTE	Housing Ambassadors are cross-trained in roles for: 24/7 front desk staffing, security, perimeter monitoring, and fire-watch patrols. They conduct entry wandering, search for weapons/substances and respond to emergencies with first aid or Narcan administration. Ambassadors clean, repair, and prepare beds for newly arriving guests. They coordinate meal distributions, conduct wellness checks, and assist with hygiene supplies, pet care, and personal storage. As Community Ambassadors , they serve as a visible, positive presence, promoting goodwill with local residents and businesses surrounding the shelter. They perform routine beautification and litter removal and act as community stewards, conducting outreach and assisting as frontline responders in case of emergencies. Their stewardship model prioritizes the Good Neighbor Policy.
Janitorial Staff	2.8 FTE	Cleans facilities, empties trash, clears grounds, and ensure hygiene and sanitation in guest/staff spaces including frequent sanitizing of “high-touch” spaces to prevent spread of germs.

FIVE KEYS HOUSING STAFF TRAINING AND FREQUENCY

TRAINING	REQUIRED FOR	FREQUENCY
HMIS Training on intakes, document uploading, services, case notes and reports	Case managers, supervisors, assistant directors, program managers, directors	Onboarding; Annually; As needed
Case Management and Systems Navigation 1	Case managers entry level	Onboarding; Annually; As needed
Case Management and Systems Navigation 2	Case managers with 6 or more months of experience	Onboarding; Annually; As needed
Care Coordination and System Navigation 3	Case managers and their supervisors	Annual
Problem solving	Case managers	Onboarding; Annual
Boundaries and ethics	All staff	Annual
De-escalation	All Staff	Annual
Harm reduction	All Staff	Annual
Trauma informed care 101 & 102	All Staff	Annual
Motivational interviewing	All Staff	Annual
Quality standards	All Staff	Annual
Mandated reporter training	All Staff	Annual
Overdose education and Naloxone distribution	All Staff	Annual
Five Keys' New Hire Orientation/Onboarding <ul style="list-style-type: none"> ● Preventing Discrimination and Harassment: Employee training (1 hour online) ● Inclusive, Harassment-Free Environment (3 hour in-person training with HR) ● HR Paycom training and benefits 	All staff	At hire; Annually; As needed by individuals
Professional Standards <ul style="list-style-type: none"> ● Workplace ethics, Self-Accountability, Professionalism, Shelter Standards of Conduct; Confidentiality ● Dress Code and Public Image ● Fraternalization; Setting Safe and Healthy Boundaries ● Customer Service Training 	All staff	Annual
Policies and procedures <ul style="list-style-type: none"> ● Emergency Procedures ● Grievance Policy ● Good Neighbor Policy ● Service Animal/Pet Policy ● Visitor Policy 	All staff	Annual
Cultural and Gender Awareness <ul style="list-style-type: none"> ● Anti-oppression, implicit bias, sexual orientation /gender identity training; LGBTQ+ inclusivity and awareness of transgender guests' needs ● Supporting diverse populations, incl non-English speakers, individuals with disabilities, those affected by housing instability, substance use, or incarceration 	All Staff	Annual
Americans with Disabilities Act and Reasonable Accommodations	All supervisors; site directors	Annual

Denials of Service	All supervisors; site directors	Annual
Motivational Interviewing	All care coordinators and supervisors	Annual
Document Acquisition	Case Management	Annual
Resource and Referral	Case Management	Annual
Aerosol Transmissible Disease	All Staff	Annual
Exposure to Blood Borne Pathogens	All Staff	Annual
CPR and First Aid	All staff	Available annually; Certification valid 2 yrs
Opioid Overdose Recognition Prevention and Response	All staff	Available annually; Certification valid 2 yrs
Biohazard sharps disposal and drug user sensitivity	All staff	Annual
OSHA 10	Janitorial and supervisors	Annual
Hygiene protocols, disease transmission, and emergency health procedures	All staff	Annual
Safe Food Handling	All ambassadors, supervisors	Annual
Safety; crisis intervention; de-escalation; conflict resolution	All staff	Annual
Mental Health First Aid	All Staff	Annual
Behavioral health and medical service integration; Mental Health Cultural Competency	All Staff	Annual
Mental Health & Substance Abuse 101	All Care Coordinators and supervisors	Annual
Adult Congregate Shelter Manual	All congregate shelter staff	Annual
Trauma, Toxic Stress and Self Care	Case managers, licensed clinicians	At onboarding; during monthly meetings
Professional Development for Leaders		
Emotional intelligence and fostering inclusive environments; Standards of Care (i.e. motivational interviewing, trauma-informed care, effective communication).	Ambassadors, Case Managers; and supervisors	Onboarding; Reviews each shift; monthly meetings w/clinical supervisor for CM
Good Soil: 6-mo Leadership and Development Training (2-5 hours of coaching monthly, w additional homework) <ul style="list-style-type: none"> ● Management & leadership skills for first-time supervisors & managers ● Effective communication ● Emotional intelligence and change management ● Leadership, team-building, and coaching skills; ● Addressing internal biases; fostering inclusive environments ● Be the Manager Your Employees Want to Follow 	Voluntary and open to all staff.	New cohorts offered quarterly



Day-Use and Services Policy

Purpose

The purpose of this policy is to define the procedures and standards for access, conduct, and service delivery for guests utilizing the Access Center. This area provides daytime access to essential services and community resources such as restrooms, computers, groups, and classes. The policy ensures that all Access Center operations are managed safely, equitably, and in alignment with Five Keys' trauma-informed and low-barrier philosophy. It also establishes a clear separation between Access Center spaces and shelter living areas to protect the privacy and security of overnight guests while fostering engagement and connection among community members seeking stability and support.

Guiding Principles

- Access Center services are open to all unsheltered or at-risk community members seeking daytime support.
- All guests and staff must adhere to security screening and conduct expectations.
- Every guest is treated with professionalism, compassion, and respect.
- The Access Center area operates independently from the shelter to ensure privacy and safety for overnight guests.
- Services focus on connection, stability, and pathways to long-term housing and wellness.

Access Center and Entry Process

- Access Center guests may access the facility during posted hours of operation (8:00 a.m.–5:00 p.m., Monday–Sunday).
- All guests must check in at the main entrance and pass through security screening before entering.
- Ambassadors will:
 - Conduct visual bag checks and metal detector screening.
 - Prohibit weapons, drugs, alcohol, or hazardous materials.
 - Secure any prohibited items for return upon exit when appropriate.
- Guests receive an Access Center Guest Badge identifying them as authorized visitors for that day.
- Re-entry on the same day may be permitted at staff discretion, subject to capacity limits.
- Access to shelter living areas, sleeping quarters, or staff-only offices is strictly prohibited for Access Center guests.

Available Access Center Services

- Guests may utilize services and amenities, including:
 - Restrooms and handwashing stations
 - Computers and phone charging stations
 - Case management or resource navigation appointments
 - Group activities, classes, and workshops
 - Support groups and community programming
 - Educational, employment, and life skills sessions
 - Referrals for medical, behavioral health, and housing support
- Availability of services may vary by day and program schedule.

Guest Conduct and Expectations

- Guests are expected to:
 - Treat staff, volunteers, and peers with respect at all times.
 - Follow staff directions and posted rules of conduct.
 - Maintain personal belongings within designated areas.
 - Refrain from disruptive behavior, substance use, or verbal abuse.
- Violations of conduct policy may result in temporary or permanent suspension from Access Center services, subject to supervisor review.

Staff Responsibilities

- **Ambassadors:** Manage screening, entry, and enforcement of safety protocols.
- **Front Desk/Reception Staff:** Register guests, issue badges, and monitor occupancy.
- **Care Coordinators:** Deliver classes, case management, and supportive services.
- **Janitorial/Maintenance Staff:** Maintain the cleanliness and readiness of shared spaces.
- **Site Director or Supervisor:** Oversee program operations, coordinate with community partners, and approve any service suspensions.

Documentation and Data Tracking

- Guest check-ins and services utilized are recorded daily in the program database or sign-in logs.
- Incidents, injuries, or security interventions are documented immediately in an Incident Report Form and submitted to the Site Director.
- Monthly summaries of guest visits and service participation are compiled for internal reporting and quality improvement.



Bed Reservation and Allocation System

Purpose

This policy outlines the standardized process by which Five Keys manages bed reservations, allocations, and holds within its shelter facilities. The purpose is to ensure that access to shelter is fair, transparent, efficient, and person-centered, while maintaining safety and maximizing occupancy.

Guiding Principles

1. All individuals are provided equal opportunity for shelter placement regardless of income, background, or circumstance, consistent with applicable law and agency standards.
2. No one is denied entry based on sobriety, employment, or prior housing status.
3. All bed allocation decisions are documented, logged, and reviewed by supervisory staff.
4. Assignments consider individual safety, health, and compatibility factors to support a stable environment.
5. Beds are tracked and managed in real time to maintain full utilization and readiness for emergency needs.

Definitions

- Active Bed: A bed currently in use by a guest.
- Reserved Bed: A bed held temporarily for a returning guest or for an approved referral.
- Vacant Bed: A bed available for assignment.
- Emergency Hold: A temporary reservation of a bed (up to 24 hours) for a guest with an approved, documented reason for absence.

Procedures

Intake and Assignment

- Beds are assigned on a first-available basis, unless otherwise directed by clinical, safety, or programmatic criteria.
- Intake staff record all admissions, discharges, and holds in the designated shelter management database.
- Each guest receives a bed assignment that links to their record.

Daily Reservation Process

- Guests must confirm the continuation of stay each day.
- Guests who fail to check in or communicate with staff are marked for potential release.
- Beds marked for release become available to the next eligible guest on the waiting list after supervisory review.

Temporary Holds

- Staff may hold a bed for a guest for up to 24 hours due to hospitalization, or crisis.
- Holds exceeding 24 hours require Site Director approval.

Allocation Priorities

Vacancies are filled according to the following priority framework:

1. Referrals from partner agencies with verified eligibility.
2. Guests with the highest safety or medical need.
3. Individuals with active case management plans.

Data Management

- All bed activity (assignments, holds, exits) is logged daily in the management system.
- Staff conduct a daily reconciliation of the physical bed count versus database records.
- Monthly audits ensure data accuracy and compliance with agency reporting standards.

Transfers and Special Circumstances

- Transfers between program areas or facilities must be processed and approved by intake and/or supervisory staff.
- Guests may request a transfer for medical, safety, or personal reasons; staff evaluate feasibility based on available space and operational needs.

Responsibilities

Role	Responsibilities
Intake Staff / Care Coordinators	Conduct intake, assign beds, record data, and manage daily check-ins.
Shift Supervisor	Review holds, approve daily releases, and ensure proper documentation.
Site Director	Approve exceptions, review allocation reports, and monitor compliance.
Data Coordinator	Maintain system integrity and reporting accuracy.



Site: _____
Bed/Room/Cabin #: _____

FIVE KEYS PARTICIPANT AGREEMENT

Welcome!

Temporary Shelters do not provide permanent housing, and guests staying at these sites do not have tenancy rights. Nonetheless, all guests are entitled to fair, respectful, and equitable treatment.

The following program guidelines apply to all guests staying at Temporary Shelter Program sites. Please read each guideline carefully and place your **initials** next to each one to indicate you have read and understand it.

COMMUNITY GUIDELINES

- Treat everyone with respect, civility, and dignity.
- Participate in Wellness Checks, housing services, and daily health screenings.
- No visitors, except for those providing essential services.
- Respect quiet hours between **10:00 PM – 7:00 AM**.
- Keep animals under direct control at all times.
- Smoke only in designated areas.
- Clean up after animals in designated areas.
- Respect property and keep it in good condition.
- Work on individualized goals to achieve permanent housing.

Guest Initials: _____



Site: _____
Bed/Room/Cabin #: _____

PROGRAM GUIDELINES

Working on Housing Goals

- Meet with assigned Care Coordinator weekly (or more as needed).
- Develop an individual housing plan and follow it.
- Provide necessary documentation to support your housing goal.

Guest Initials: _____

Mental Health Supports

- Participate in on-site mental health supports if offered.

Guest Initials: _____

Respectful Interactions

- Behave respectfully; no harassment, abusive language, or lewd behavior.

Guest Initials: _____

Health Screenings

- Guests may be screened for COVID-19 symptoms if there is an active case on-site.

Guest Initials: _____



Site: _____
Bed/Room/Cabin #: _____

Visitors

- No visitors, unless providing essential services with staff coordination.
- No overnight visitors or visiting other guests' bed areas.

Guest Initials: _____

Removal of Property

- If you exit voluntarily or through termination, your belongings will be inventoried and stored for **30 days**. Unclaimed property may be disposed of after this time.

Guest Initials: _____

Leaving the Site

- Absence for **three or more consecutive days** without reasonable contact may be treated as a voluntary exit (self-exit). The bed may be reassigned; belongings stored for 30 days.

Guest Initials: _____

Masks

- Guests are encouraged to wear a mask. Guests who are COVID-19 positive must wear a mask when not eating, drinking, showering, or in bed.

Guest Initials: _____



Site: _____
Bed/Room/Cabin #: _____

Safety Equipment

- Do not tamper with or remove smoke or carbon monoxide detectors. Do not hang items on sprinklers.

Guest Initials: _____

Violent Behavior

- Violence or threats of violence are not permitted and may result in immediate removal and possible prosecution.

Guest Initials: _____

Weapons

- No weapons are allowed on site. Firearms must be turned in to be sent to the Police. Other weapons must be stored safely with the staff.

Guest Initials: _____

Fire Damage and Arson

- Activities that could start fires are prohibited. Violations may lead to immediate removal.

Guest Initials: _____



Site: _____
Bed/Room/Cabin #: _____

Pest Control

- Participate in pest inspections and treatments as directed.

Guest Initials: _____

Animals

- Keep animals leashed or in a container in common areas and under your direct control.
- Feed and water animals in designated areas. Clean up waste properly.
- Animals must not be aggressive or loud.
- If your animal bites or attacks, it must be removed from the site.
- Guests are encouraged to maintain current rabies vaccinations for their animals and may work with staff to obtain needed vaccinations.

Guest Initials: _____

Smoking

- Smoking is not allowed in dorms or common areas. Smoke only at least 15 feet from entrances/exits.

Guest Initials: _____

Quiet Hours

- Quiet hours are **10:00 PM – 7:00 AM**. Guests are encouraged to stay in their rooms.

Guest Initials: _____



Site: _____
Bed/Room/Cabin #: _____

Egresses

- Maintain your space safely, keeping clear pathways to exits.

Guest Initials: _____

Wellness Checks

- Participate in daily wellness checks and allow staff to observe your space.

Guest Initials: _____

Emergency Safety Checks

- Staff may enter your space if they believe there is an immediate risk.

Guest Initials: _____

Bed Inspections

- Participate in weekly bed inspections for health and sanitation.

Guest Initials: _____

Meals

- No food allowed in dorms. Eat in designated dining or outdoor areas.

Guest Initials: _____



Site: _____
Bed/Room/Cabin #: _____

Mail

- Mail may be delivered while enrolled. Mail will be held for 30 days after exit.

Guest Initials: _____

TERMINATION & EXIT POLICY

Immediate Termination of Service

Site staff may execute an **Immediate Termination of Service** for any serious rule violation posing a direct threat to health or safety, including but not limited to:

- Sexual assault
- Physical violence or threats of violence
- Severe threatening behavior that cannot be mitigated
- Any conduct creating an immediate risk of harm

Belongings will be stored for at least **30 days**. Guests understand that these situations may result in **immediate removal**.

Guest Initials: _____

Termination with 30-Day Written Notice

For non-emergency violations, guests may receive a **30-day written notice** for termination for reasons including, but not limited to:

- Repeated or serious breaches of agreement/rules
- Illegal activity on-site
- Securing permanent housing or reunification
- Moving outside Los Angeles County
- Enrolling in another interim housing program
- Exceeding time limits
- Refusing to cooperate with housing plans
- Program or site closure



Site: _____
Bed/Room/Cabin #: _____

Guests have the right to reasonable accommodation, to appeal termination through the grievance process, and to have belongings stored for 30 days.

Guest Initials: _____

ACKNOWLEDGEMENT

By signing below, you acknowledge that you have received the program guidelines, understand the rules that can lead to termination or denial of service, and agree to comply with them.

Guest Name (Printed): _____

Guest Signature: _____

Date: _____

Authorized Site Staff Name (Printed): _____

Authorized Site Staff Signature: _____

Date: _____

New Guest Orientation

(Internal Process Document)



Purpose

- Establishes a standardized, trauma-informed process for welcoming and orienting new guests.
- Ensures every guest understands their rights, responsibilities, services available, and community expectations.
- Promotes safety, respect, and consistent program delivery across all Five Keys sites.

Guiding Principles

- All guests receive the same orientation regardless of background or literacy level.
- Emphasizes safety, choice, trust, and empowerment.
- Expectations and support are clearly communicated.
- Guests are encouraged to participate actively in their own success.
- Orientation procedures are uniform across all programs.

Orientation Timing

- Orientation is completed within 24 hours of admission or at first check-in.

Orientation Process

- Staff greet the new guest, explain program purpose, and introduce key staff.
- Verify ID, intake forms, and signed Guest Agreement, Consent for Services, and Grievance acknowledgment. Copies are provided to the guest.
- Show sleeping areas, restrooms, laundry, dining, and exits. Review safety features (fire alarms, first-aid, security) and posted schedules.
- Explain behavioral guidelines, substance-use policy, visitor policy, personal storage, quiet hours, hygiene, and entry/exit procedures.
- Review guest rights (safety, confidentiality, non-discrimination) and explain grievance process, response timelines, and escalation paths.
- Introduce the assigned Case Manager within 48 hours. Schedule the initial goal-setting meeting and review available supports (medical, behavioral health, employment, benefits).
- Guest signs the Orientation Completion Form confirming receipt and understanding; form is filed in the guest record.

Staff Responsibilities

- Intake Staff: Conduct welcome tour, verify documentation, and complete initial orientation steps.
- Care Coordinators: Conduct care plan
- Site Director: Oversee compliance, ensure training, and update materials as needed.

Documentation

- Orientation Checklist completed by staff.
- Orientation Completion Form signed by the guest.
- Copies of required policies and acknowledgments are retained in the guest's case file and database.



Five Keys Grievance Policy (process document)

The purpose of the Grievance Procedure is to ensure that guests have a clear process to follow when they feel that they have been treated unfairly by Five Keys staff or policies.

This can also be a great opportunity for us to get feedback from guests on how we are doing with our services. At times, it is a useful tool for having a conversation with guests about not only our responsibilities and actions, but also their responsibilities and actions as guests.

For the procedure to be effective please follow these guidelines:

- Plenty of copies of the Grievance Procedure should be available at the front desk. English and Spanish copies of the grievance procedure are available in the front desk binder.
- The procedure must be posted at every building in a visible location. Copies of the procedure should be kept at the front desk to hand out upon request.
- The procedure must also be given to every guest to sign when they sign their intake paperwork. Please take the time to explain the procedure, and sign and date the form.

During the process, all information should be kept confidential. Should the Supervisor be unable to resolve a grievance directly with the guest, all information should be forwarded to the Site Director responsible for the site. Once the Director receives the information, the Supervisor will be contacted for information and the process will continue as described below.

Please keep the grievance as confidential as possible. Guests who file grievances should not be discussed with other site staff unless the other staff members are directly involved. If a support services staff member is assisting the guests with a grievance, be sure to confirm with the guests if they want you to discuss the matter with the services staff.

Guests must never suffer any retaliation from staff or denial of services for requesting or filing a grievance. Evidence of retaliation against a guest for submitting a grievance may result in immediate termination from Five Keys employment. It is our job to ensure that all guests are provided with excellent customer service, and that guests are confident that they can have their concerns heard and addressed. Even if a guest's claims are not valid, it is our responsibility to ensure that the process is conducted with respect and compassion for the guest.



Five Keys Grievance Procedure

Five Keys is committed to providing excellent customer service and fairness to our guests. If you think we have failed in our efforts to do so, or that we have policies and procedures that are unfair, we want to hear from you! If you think you have been treated unfairly your issue will be carefully considered by Five Keys management and that we will try to come to a satisfactory resolution for everyone.

Below are the steps you need to take if you have a grievance. This process only applies to grievances involving the policies and employees of Five Keys; if you have a grievance with one of the other agencies at your location you must follow their procedure.

FIRST: What is a grievance? Basically, it is a complaint about our service. A grievance is officially defined as a condition of occupancy or application of policy that you as the guest believe is unjust or inequitable.

SECOND: What do I do if I have one? As the guest, you should take the following steps:

1. Discuss the grievance or problem first with the Supervisor on duty. There is a grievance form available at the front desk that you can complete. Or you can make an appointment with a Supervisor to provide your grievance verbally.

Within 2 days the Supervisor on duty will contact you to set up a meeting to attempt to resolve this issue, and may propose next steps, if necessary. If the issue can't be resolved at the meeting, the Supervisor will provide you with a written determination based on Five Keys Policies and Procedures or respond with a plan of action within 5 working days of the final meeting.

2. If you cannot resolve your grievance with the Supervisor or are not satisfied with the determination made by the Supervisor, you may request a meeting with the Site Director. To request a meeting, call your site phone for an appointment. The Site Director will attempt to contact you within 5 working days in order to make an appointment at the earliest, mutually agreeable opportunity to discuss the issue(s). At this meeting, the Director will attempt to resolve this issue, and may propose next steps, if necessary. This may include meeting with other staff or other steps. If your issue isn't resolved at the meeting, the Director will provide you with a written determination based on Five Keys Policies and Procedures or respond with a plan of action within 5 working days of the final meeting.



Five Keys Overdose Policy

Policy and Purpose:

At Five Keys Schools and Programs, it is our goal to ensure that our guests and tenants who are using drugs, whether prescription or otherwise, are provided with information, resources, and support to live safely and without judgment. We believe that housing is a human right regardless of behavioral challenges, substance use, financial resources, or socioeconomic challenges. Drugs and alcohol are commonly used by our guests and tenants. We offer a non-judgmental approach that attempts to meet Individuals "where they are at" with their substance use. Our role is to offer and connect community members who are using substances toward services that could assist them. We want to empower community members to make the decisions that are best for them around substance use. We strive to treat our guests with a high level of respect, compassion and confidentiality; in the hopes they will get connected to resources while staying in one of our facilities. Our number one priority is their safety and well-being, so we can equip them with the tools they need to have their homelessness be brief and one-time.

Harm Reduction:

Five Keys supports and embraces harm reduction at all of our sites. We aim to meet our guests where they are. Upon intake at any of our facilities, guests will have the opportunity to meet with an intake coordinator in a private and confidential space. During intake, they will have the opportunity to disclose any type of substance use without judgment. They will then meet with a care coordinator who can offer them resources such as drug treatment, drug maintenance, or harm reduction resources and services. If the guest is not interested in any of these services, we will continue to support them and be ready to provide them with resources if they so desire.

These resources are readily available for our guests. We have printouts available on the following link: <https://sf.gov/information/overdose-prevention-resources> as well as working in collaboration with the Harm Reduction Coalition and The DOPE Project to provide up-to-date resources and tools such as Fentanyl Test strips.

Implementing Harm Reduction - Policies and Procedures

At any Five Keys Sites, guests and tenants will be met with a harm reduction approach while keeping in alignment with HSH rules regarding drug use. We use harm reduction principles to drive our procedures, such as:

- Staff will not ask guests/tenants to be abstinent, only ensure that they are not using in certain areas, particularly communal spaces.

- Staff should help guests/tenants recognize that some ways of using substances are safer than others and support them in employing these.
- Staff should recognize that the realities of poverty, class, racism, social isolation, past trauma, sex based discrimination, and other social factors that affect community members' vulnerability to and capacity for effectively dealing with substance use.
- If guests have noted they want more wellness checks or if a Five Keys supervisor or director sees a need for more wellness checks, we will do so at our own discretion. We use a roster system to track guests who request additional wellness checks or who may be considered at "high risk" for overdose or medical complications.
- Providing wellness checks on guests in single room occupancies 2 times during the day shift and swing shift, and then 1 wellness check overnight in a respectful manner by knocking softly on the guests' door and asking for a response so we know everyone is well.
- In congregate shelters, our ambassadors walk through the dorms multiple times during shifts. Staff also perform bathroom checks every 15 minutes. If guests are using the ADA restroom, we will also perform frequent wellness checks.
- Narcan is provided at all sites, and staff attach Narcan to their lanyard so they are always prepared in the event of an emergency.
- We provide harm reduction supplies at our locations.

Implementing Harm Reduction - Staff Role:

Staff will support guests/tenants with their harm reduction plans. Examples of this include:

- Supporting a guest/tenant who has decided to reduce the amount of substances they consume in a day.
- Listening to and honoring a guest/tenant's story about how they became dependent on substances.
- Helping a guest/tenant move through the shame often associated with addiction so that they can make conscious choices about their use
- Giving a guest/tenant information on how to use more safely and prevent disease and Overdoses
- Staff will not ask a guest/tenant to leave the shelter for drug use or for having paraphernalia in the shelter. When addressing a guest/tenant who is using substances in communal areas, staff should offer alternative solutions to use safely in other areas.

Housing First Principles:

Five Keys Schools and Programs fully supports Housing First Principles such as

- Housing is the foundation for life improvement, and “Housing First” principles enable access to permanent housing without prerequisites or conditions beyond those of a typical renter.
- We do not require individuals experiencing homelessness to address certain challenges before providing them with housing, as we can expect would be the case with a typical renter in the private market.
- Allows for and supports robust treatment for behavioral health challenges, including substance use

At all of our locations, we will have up-to-date information regarding harm reduction information, such as where to access supplies, get Narcan, maintenance meds, and more. These fliers will be hung in various locations around the sites, such as near the entrance, bulletin boards, dining room, bathrooms, and case management offices.

Overdose Reversal:

All of our staff are highly trained in Overdose Reversal; training is provided upon orientation through The DOPE Project trainers. All Five Keys Staff also attend the yearly DPH overdose training.

If a guest on site is to experience an overdose, below is how our staff will respond.

- Staff will first try to wake them by calling their name. If there is no response, staff will try to stimulate them by doing a sternum rub or a pinch to the back of the arm.
- If this still does not generate a reply, staff are trained to give the person a “verbal Narcan”.
 - Example: “John, if you do not reply, I am going to administer Narcan”. If there is still no response, staff will call 911 immediately.
- Staff will administer 1 Narcan every 2 minutes
- Staff can perform mouth-to-mouth on the guest while waiting for paramedics
- All staff carry at least 2, sometimes more, Narcan with them at all times. Our sites are stocked with nasal Narcan

Compliance:

Five Keys Schools and Programs commits to documenting all overdoses that happen in our sites with a CIR submitted to HSH promptly.



Five Keys Good Neighbor Policy

At Five Keys, we are dedicated to fostering harmonious and respectful communities within our housing programs. Our Good Neighbor Policy outlines the principles and expectations we uphold to ensure a positive living environment for all residents.

1. Five Keys shall work with neighbors, City/County Partners, Police Departments, Fire Departments, Department of Public Works (DPW), Department of Public Health (DPH), and other relevant city agencies to ensure that neighborhood concerns about the facility are heard and addressed.
2. Five Keys shall assign a director, manager, or representative to participate in and attend appropriate neighborhood and community meetings.
3. Five Keys shall also develop and maintain a proactive communication plan that includes community meetings, newsletters, and updates to nearby businesses and residents.
4. Five Keys shall provide a phone number to all interested neighbors that will be answered at all times by a supervisor or other responsible person who has the authority to respond to complaints and issues at the Site as they arise.
5. Five Keys shall minimize the impact on the neighborhood of the Site; guests entering, exiting, or waiting for services. The Site will do this by limiting referrals, not allowing walk-ins, and having 24/7 access to the Site for registered guests.
6. Five Keys shall actively discourage and address excessive noise from program participants and others who may be just outside the program Site.
7. Five Keys shall actively discourage loitering in the area immediately surrounding the program. Coordinate with other service providers and City agencies, as necessary, to address this issue.
8. Five Keys shall, in conjunction with City agencies, inform neighborhood businesses and residents of the services available at the Site and how individuals are referred.
9. Five Keys shall include a public education and outreach component that explains the program's purpose, services, and success stories.
10. Five Keys shall implement management practices necessary to ensure that staff and participants maintain the safety and cleanliness of the area immediately surrounding the facility and do not block the driveways of neighboring residents or businesses.
11. Five Keys shall clarify escalation protocols for complaints, including how we will be tracked, documented, and resolved within a defined timeframe.
12. A feedback and transparency process shall be maintained so that neighbors and stakeholders can see how issues have been addressed and resolved.
13. Five Keys shall take all reasonable measures to ensure the sidewalks adjacent to the facility are not blocked.
14. Five Keys values diversity and respects the backgrounds, cultures, and perspectives of all. Discrimination, harassment, or any form of intimidation will not be tolerated.
15. Five Keys promotes a peaceful atmosphere, and we have designated quiet hours during which guests are expected to minimize noise levels. Quiet hours typically begin in the evening and extend until the morning.
16. Guests with pets are required to adhere to our pet policy, which typically includes leash laws, cleaning up after pets, and ensuring that pets do not disturb other guests or neighbors.

Stephen Good

415.734.3311 (W)

415.652.9130 (C)

Steveg@fivekeys.org

www.linkedin.com/pub/steve-good/4b/12/b33/

Management / Administrative Experience

2008 – Present **President and CEO, Five Keys Schools and Programs, (501(c)3**

Headquarters: 70 Oak Grove Street, San Francisco, CA 94107

Strategically lead Five Keys Schools and Programs from its early years as the first-ever charter high school in a county jail into a leading-edge non-profit that reengages “at-risk” and “in-risk” transitional-age youth and adults in 12 California counties through housing, education, workforce development, and reentry case management.

Developed a flexible model that welcomes partners from public and private entities to combine resources to address challenges people face while seeking to better their lives for their families and their communities.

Grew Five Keys from 13 staff members serving 175 students daily in San Francisco jails to a non-profit with holistic programs that employ more than 900 staff and reach 25,000 adults and transitional youth each year in 24 jails and at 80+ community sites in underserved neighborhoods across California.

Oversee programs in 12 counties: San Francisco, Alameda, Los Angeles, San Bernardino, Sonoma, Marin, Santa Clara, San Mateo, Solano, San Joaquin, Riverside, San Diego.

Housing

Established housing services division overseeing up to 1,246 guests at 9 shelters in San Francisco, with comprehensive case management and navigation services, in San Francisco and Alameda counties; and housing navigation for Transitional Aged Youth through SF Mayor’s Rising Up program.

Developed Five Keys Home Free, reentry transitional housing for long-incarcerated women survivors of violence; opened in 2020 with six 2-bedroom apartments on Treasure Island, with support from SF Mayor London Breed, State Treasurer Fiona Ma; funded in part by \$1 million in in-kind and cash donations.

Education

Oversee Five Keys Charter School, Adult School, Independence High School; chartered through SFUSD; including CTE programs; high school, GED, college counseling, ESL and remedial education programs at more than 23 jails and 80+ community sites serving 2,000+ students daily, pre-pandemic. Serving Transitional Aged Youth (17+) and adults.

Workforce Development

Developed workforce programs including transitional employment for formerly incarcerated and homeless individuals, digital literacy programs, workforce-oriented remedial education through WIOA Title II, and two jail-based career centers.

Reentry

Developed reentry programs, including in-custody case management for adults and Transitional Aged Youth, including cognitive behavioral programming, life skills education and community connections upon release in San Francisco and Los Angeles.

- 2018 – Present **Member: State Advisory Task Force on Alternative Schools, CDE**
Established to advise the California Department of Education on Alternative Assessment Measures for DASS Schools
- 2012 – Present **Member: Community Corrections Partnership (CCP), City and County of San Francisco**
Established through SB 678: California Community Corrections Incentive Act, the CCP (headed by the Chief of Probation) advises each county on the use of evidence-based practices in sentencing and probation
- 2015 – 2019 **Commissioner, Chairperson, Southeast Community Facilities Commission, City and County of San Francisco**
Appointed by former/late Mayor Ed Lee
1800 Oakdale Ave, San Francisco, CA 94124
- 2001 – 2007 **Principal / Director of Non-Profit Corporation / Creative Arts Charter School, (K-8, Public School / 501(c)3 Non-Profit Corporation), SFUSD**
1601 Turk Street, San Francisco, CA 94115
- 1999 – 2001 **Executive Director, Officer of Corporation, Merryhill Schools Inc., NEDI Inc.**
(7 Schools: Subsidiaries of Nobel Learning Communities Inc.)
1500 Yosemite Drive, Milpitas, CA 95353
- 1997 – 1999 **Principal, Merryhill School (K-8)**
4580 Bennett View Drive, Santa Rosa, CA 95404

Teaching Experience (1992 – 1997)

- 8th Grade US History / Literature; Rainbow Bridge Middle School, Milpitas, CA
- Economics, US History, Government; San Mateo Adult School, San Mateo, CA
- GED Program; Youth Chance High School, San Francisco, CA
- US History; San Mateo High School, San Mateo, CA

Education

Sonoma State University, Rohnert Park, CA; Master of Arts Degree: Education, School Administration
San Jose State University, San Jose, CA; Bachelor of Arts Degree: Psychology; Minor: Business Admin.

ELYSE GRAHAM

70 Oak Grove Street, SF CA 94107 415-410-8530 elyseg@fivekeys.org

PROFESSIONAL EXPERIENCE

2008 – Present Five Keys Schools and Programs San Francisco, CA

Chief Operating Officer 3/2013 - Present

- Oversee housing services division, including 9 housing programs with transitional, permanent, and reentry housing and approximately 500 employees
- Oversee development of new housing projects, including site design and plans, contractual negotiations, hiring and training, budgeting, fulfillment of contractual obligations and relationships with vendors and city and county partners
- Responsible for over \$36 Million housing budget, audit and reporting
- Implement grant funded programs and report on outcomes
- Provide leadership to academic and housing staff
- Cultivate strategic partnerships with program directors and partners
- Direct program evaluations and design strategies
- Design and lead professional development program and activities
- Set challenging cross-functional goals that support the organizational goals and strategies
- Assist President & CEO in planning and executing annual budget
- Design and implement operational plan goals and objectives for the schools and housing
- Support WASC accreditation and implementation of school-wide Learner Outcomes
- Provide monthly reports to the President & CEO
- Oversee adherence to the collective bargaining agreement
- Develop and maintain strong relationships with partner agencies that includes recruitment, goals, enrollment, program management, and furthering Five Keys' initiatives
- Provide oversight to staff related to all policies and procedures

Director of Operations 2008 – 3/2013

- Provide academic leadership to teaching and operational staff
- Mentor teachers on proper procedures for implementing and teaching approved curricula
- Develop best practices for teachers to maintain consistent teaching standards throughout school
- Monitor classroom teaching, student achievement, and goal attainments
- Develop operational functions and procedures essential for increasing productivity
- Directed areas with multiple functions together with division and department managers
- Collaborate with Directors, teachers, and partner organizations to develop, monitor, and implement curriculum in alignment with the Common Core Standards
- Ensure the successful coordination of TABE and CAHSEE administration and data collection
- Ensure efficient and effective student services processes
- Facilitate graduation planning and implementation
- Assist with the development and implementation of annual professional development goals
- Ensure all student progress is documented, including improving course assessments, attendance, grades, behavior and graduation
- Develop new partnerships, services, outreach, and recruitment activities that enhance the mission of employing the formerly incarcerated by locating businesses
- Assist in development and monitoring of classes for performance by providing clear and direct verbal and electronic feedback to teachers in a timely manner

2007- 5/2012 Acupuncture and Integrative Medicine College Berkeley, CA

Assistant Professor

- Teach public health class for Masters Degree acupuncture students. Focus is on the integration of Chinese Medicine into the arena of Community Health, disease prevention, at risk populations and health education

2006 - 2008 San Francisco Sheriff's Department San Francisco, CA

Program Coordinator

- Plan, organize and coordinate programs in the county jails; supervise and monitor the inmate/post release prisoners attendance and progress in the various programs
- Evaluate and address inmate's needs, requests and concerns regarding educational and counseling programs in the jails; provide referrals and coordinate services to assist prisoners in community reintegration
- Promote and maintain liaisons with custody staff, public and private agencies and individuals supporting the different programs; networking with community organizations and City departments
- Coordinate and ensure the movement of mandated, probations and other appropriate inmates into programs

ELYSE GRAHAM

70 Oak Grove Street, SF CA 94107 415-410-8530 elyseg@fivekeys.org

- Act as liaison between SFSD and Adult Probation and Dept. of Child Support Services to facilitate increased collaboration to better meet the needs of SFSD prisoners

2003 - 2006 American College of Traditional Chinese Medicine San Francisco, CA

Adjunct Faculty

- Teach acupuncture students in the areas of public health, chemical dependency and trauma for clients in criminal justice and substance abuse treatment setting. Ensure that students are prepared to provide culturally competent clinical services to diverse populations in various public health settings

2005 - 2006 Walden House for In Custody SISTER Program San Francisco, CA

SISTER Program Manager

- Responsible for daily operations and planning, directing and implement all aspects of the SISTER program
- Trains and directly supervises staff and integrates community providers into the program
- Responsible for client retention, successful completion and placement into treatment post release
- Ensure accurate records and compliance with Walden House guidelines and the SFSD contract
- Develop and maintain relationships and communication with custody, program staff and community agencies

2004 - 2005 Community Works, SISTER Program San Francisco, CA

SISTER Violence Prevention Counselor

- Teach violence prevention and anger management classes to those in custody
- Provide education regarding the cycles of violence, domestic violence, sexual assault and physical violence
- Facilitate support group to addresses violent behavior in women with serious violence charges

2002 - 2006 Community Works, RSVP Program San Francisco, CA

Resolve to Stop the Violence Project - Survivor Impact Group Facilitator

- Facilitate violence prevention groups with male perpetrators of violence
- Provide education about how race, class, gender and sexual orientation are intertwined in the cycles of violence

1997- 2005 Acupuncture & Recovery Treatment Services San Francisco, CA

Executive Director and Lead Acupuncturist

- Recruit and retain qualified, dedicated and diverse staff and ensure staff provided high quality, culturally competent clinical services to a diverse population
- Responsible for all contract management, fiscal and reporting accountability to all funders
- Provide acupuncture within the criminal justice system and post release at community based facilities

1994-2004 Immune Enhancement Project San Francisco, CA

Executive Director 1998-2004

- Developed innovative client centered community acupuncture program for those living with HIV/AIDS
- Responsible for \$500K annual budget, audit and reporting to government and foundation funders

Program Director 1994-1997

- Conducted intakes/assessments, evaluated eligibility and ensured compliance with best practice standards
- Ensured high quality, client centered care for those with and life threatening diseases and expanded access to treatment for an additional 200 low income clients

EDUCATION

1997 - 2006 University of Berkeley Extension Berkeley, CA

- Alcohol and Drug Abuse Studies Certificate Program

1991 - 1997 American College of Traditional Chinese Medicine San Francisco, CA

- Masters of Science in Traditional Chinese Medicine Licensed Acupuncturist State of California # 6808

1980 - 1991 San Francisco State University San Francisco, CA

- Bachelors Degree Special Study - 'Holistic Health with an Emphasis on African Americans and Women'

Brandi Marshall

Experience

12/2020 - Present

Five Keys Schools and Programs, San Francisco CA - **Director of Housing Services**

As Co-Director of Housing Services I oversee several housing sites by using strategic leadership to meet compliance, budgeting, and staffing needs.

- Monitor the operations, maintenance and record keeping of all properties to ensure compliance with city and county requirements.
- Ensure full compliance with program and development contracts and regulatory agreements, and ensure effective asset management.
- Provides site performance reports and develops corrective action plans for under-performing programs.
- Develops management plans, monitors monthly financial performance, and establishes capital improvement budgets for all properties.

10/2014 - 03/2016

Symmetry Elevating Solutions, Fresno CA- **Accountant**

Created accounting functions in a new location for a 22-million-dollar company. Also responsible for all warehouse duties including inventory and shipping.

- Responsible for all accounting functions including: A/R, A/P, invoicing, daily deposits, weekly reporting, and month end closing
- Created an organizational warehouse system to track all inventory easily. Was responsible for packaging and shipping all products timely and cost efficiently.
- Helped create a custom CRM system. Including adding fields and correcting code. Was responsible for working with India, getting quotes and getting each project completed.

10/2012 - 02/2014

St. Mary's Court Housing Development, Washington DC - **Director of Housing Operations**

All non-profit accounting and bookkeeping functions, Supervised Accounts Receivable and Human Resources department.

- Overseen Accounts Payable functions, including direct supervision of A/R specialist, oversee general ledger activities, including preparation and review of accounts reconciliations, assist in preparation of financial analysis, and maintain fixed assets.
- Human Resource duties such as hiring, onboarding, training, administer pension and health insurance plans, and payroll.

10/2005 - 08/2011

Courtyard by Marriott, Fresno CA - **AGM/Controller/Director of Human Resources**

Duties included budgeting, revenue management, journal entries, reporting, A/P, A/R, recruiting, policies, procedures, training, etc.

- Managed all day-to-day hotel operations including front desk, engineering, housekeeping, F&B.
- Performed Revenue Management duties including forecasting, flow reports, budget, and reporting.
- Performed all Human Resources duties including implementing policies, surveys, corrective actions, terminations, recruiting, training, all payroll functions, and monthly reporting to corporate office.

Education

Fresno Pacific University, Fresno- B.A., Management and Organizational Development

U.S. Army - MOS67T- B.A., Blackhawk Crew Chief (served in Iraq War)

Computer Knowledge

Advanced Excel, Advanced QuickBooks, Sage, Microsoft Office, Oracle, Famous, MAS90, Yardi, ADP PeopleSoft, Paychex, Millennium, Apple Computers, PC Computers, ICAMS, Microsoft 365, CRM, Clarity One System, RTZ.

KIM-UYEN DUONG

PROFESSIONAL EXPERIENCE

Director of Care Coordination , Five Keys Schools and Programs; Feb. 2023 - present

Leading Five Keys' team of Care Coordinators/Housing Navigators. Develop staff competencies, especially for those who are still in training or who are early-career practitioners. Foster a collaborative environment, ensuring a team-based approach to caring for those we serve. Work with our Program Directors to identify, create and implement policies, procedures, and training.

Program Coordinator, Bayview Hunters Point Foundation; June 2021- March 2023

- Oversee a team of case managers that provide field-based services to homeless individuals who are enrolled in the Rapid Rehousing and Flex Program
- Design, implement and produce reports and workflow systems to better optimize program operations
- Attend case conferences with case managers, behavioral health, and other community providers as needed
- Prepare and provides weekly updates on Rapid Rehousing and Flex housing placements and performance to the Director of Housing
- Engage in cross-functional collaboration with HSH and community partners on planning and implementing housing-related services for Rapid Rehousing and Flex program
- Ensure case managers are completing required ONE System data entry in alignment with HSH's continuous data quality improvement process
- Develop, review and revise, as necessary, all administrative policies and procedures in keeping with Appendix A

Case Manager Lead, Bayview Hunters Point Foundation; 2020-2021

- Oversee team of 6-8 Care Coordinators.
- Coached and trained Care Coordinators with an emphasis on HMIS, case management context and development
- Collaborated with site CBO and Five Keys staff on casto ensure quality service delivery and guests needs were met
- Supported staff in responding appropriately to crisis situations that arise with guests

- Developed and maintained communication and positive relationships with external organizations, institutes, and community partners
- Responsible for maintaining case notes on each client; accurate and regular input data into HMIS, maintain guest information in accordance with HSH's standards.
- Prepare and support guests in securing housing, benefits and other resources as needed
Maintain all required compliance & consistency with organizational policies & procedures in accordance with Five Keys and HSH.

Lead Guide Manager, Bonobos; 2018-2020

- Oversee and provided leadership to staff by daily coaching
- Implement and modeled customer service standards by ensuring unbeatable excellence that are aligned with customer needs, expectations, and company goals
- Developed client experience strategies and plan instore initiatives to drive product engagement, customer experience, brand loyalty, conversion and sales
- Managed and planned execution and implementation of in-store visual merchandising by creating displays for guide shop
- Provided support with the implementation of business solutions by building relationships and partnerships with key stakeholders

Senior Admin, Wells Fargo Bank; 2004-2011

- Provided support to the Head of Direct Payments and other senior level management.
Performed daily tasks including composing confidential correspondence, handling sensitive inquiries, coordinating meetings and preparing agendas

Education: Diablo Valley College; A.S. Business Administration 2005

Languages: Fluent in Vietnamese

Professional Summary

Experienced and compassionate Care Coordinator with a strong background in guest engagement, case management, and interdisciplinary collaboration. Proven ability to conduct comprehensive assessments, develop care plans, and ensure program compliance. Committed to improving service delivery through effective communication, accurate documentation, and ongoing quality assurance.

Core Competencies

- Multidisciplinary Team Collaboration
 - Program Oversight & Compliance
 - Goal Setting & Strategic Planning
 - Documentation & Data Management
 - Quality Assurance & Policy Adherence
 - Client Engagement & Advocacy
 - Scheduling & Case Management
 - HMIS & Apricot Database Proficiency
 - Launched new sites in various counties to ensure highest quality of guest care
 - Integrating policies and procedures into client service workflow
-

Professional Experience

Assistant Director of Care Coordination

Five Keys Schools and Programs, Oakland, CA **August 2024 – Present**

- Provide oversight for the Care Coordination team throughout the state at all sites
- Responsible for ensuring guest services, documentation and placement into permanent housing
- Oversee of all data tracking and accuracy in the HMIS and other systems
- Provides leadership to the entire care coordination and intake teams at all sites
- Responsible to liaison with the City / County representatives, funders, other stakeholders

Care Management Supervisor

Five Keys, San Francisco & Alameda County, CA **July 2023 – August 2025**

- Led continuous improvement of resident care through updated policies and procedures.
- Provided leadership and training to Care Coordinators and ensured policy implementation.
- Maintained compliance with HMIS and Apricot databases for accurate data tracking.
- Completed detailed assessments and collaborated on individualized care plans.
- Fostered a supportive and trauma-informed care environment for all clients.

Care Coordinator

Five Keys, San Francisco, CA **June 2022 – July 2023**

- Conducted comprehensive guest assessments aligned with regulatory guidelines
- Supported complex cases by coordinating with external community services
- Strengthened community relations through events and resident engagement.
- Contributed to policy updates and continuous care quality improvement
- Responsible for documenting guest outcomes in HMIS and Apricot databases.
- Completed detailed assessments and collaborated on individualized care plans.

- Fostered a supportive and trauma-informed care environment for all clients.

Ambassador

Five Keys, San Francisco, CA **January 2022 – May 2022**

- Created a welcoming environment and assisted in daily operations
- Engaged with guests to build rapport and ensure service satisfaction.
- Supported service recovery processes through compassionate communication.

Personal Vehicle Driver

UPS, San Ramon, CA **November 2020 – December 2020**

- Sorted and delivered packages using personal vehicles while meeting delivery timelines.
- Maintained efficiency and accuracy in route completion.

Location Manager: SMG @ Moscone Center, San Francisco, CA **March 2002 – Present**

- Managed food service concessions, inventory ordering, and daily operations.
- Supervised staff and ensured exceptional customer service during high-volume events.

Utility Worker: SMG @ Moscone Center **March 2002 – Present**

- Assembled and stocked mobile food concessions.
- Delivered perishable and non-perishable inventory across site locations.

Food Service Worker / Cashier: SMG @ Moscone Center **March 2002 – Present**

- Processed customer transactions using the Micros register system.
- Ensured cash handling accuracy and maintained customer satisfaction.

Education

High School Diploma: *Independence High School, San Francisco, CA* **June 2000**

Additional Trainings

- Goodsoil Leadership Pathway - 6 month certification (Management & leadership skills, communication, change management, team building, coaching)
- Goodsoil: Sprouting Leaders 6 month certification (Advance leadership, non-violent communication, emotional intelligence, decision making tools, leadership styles, month long capstone project)
- Case Management Standards of Care (i.e. motivational interviewing, trauma-informed care, effective communication).
- Emotional intelligence and fostering inclusive environments
- Behavioral health and medical service integration
- Mental Health Cultural CompetencyMental Health & Substance Abuse 101
- HMIS Training on intakes, document uploading, services, case notes and reports
- Case Management and Systems Navigation 1, 2, 3
- Americans with Disabilities Act and Reasonable Accommodations
- Denials of Service

Brandi Taliano

Oakland, CA | talianobrandi@gmail.com | 510.518.8698

Professional Summary

Dedicated and compassionate professional with extensive experience in direct service, shelter operations, and systems navigation for individuals experiencing homelessness and incarceration. Proven leadership in managing emergency shelter sites, collaborating with cross-sector partners, and advocating for systemic change. Committed to trauma-informed care, restorative justice, and community empowerment.

Professional Experience

Five Keys Schools and Programs, San Francisco, CA

Site Director: *OakDays (formerly Days Hotel), Oakland, CA November 2021 – Present*

Oversee day-to-day operations of a Shelter-in-Place (SIP) site serving medically fragile and vulnerable individuals experiencing homelessness. Lead all programmatic, administrative, fiscal, and compliance functions while ensuring trauma-informed, equity-centered service delivery. Develop and sustain cross-sector partnerships with public health, behavioral health, and housing agencies to coordinate wraparound care. Implement and refine Housing Navigator protocols to align with Five Keys' mission and city/county guidelines. Supervise staff performance, oversee data and reporting systems, and ensure site adheres to local, state, and federal regulatory standards. Oversee the transition from an interim housing shelter to PSH under a HomeKey grant.

Assistant Site Director: *August 2020 – November 2021*

Provided operational leadership at a high-volume shelter site under Five Keys' housing division. Supervised daily functions including facilities maintenance, staff scheduling, and payroll management. Collaborated with partner agencies and internal leadership to ensure consistent application of harm reduction practices, resident safety, and housing stabilization efforts. Attended city and provider coordination meetings to align services with Oakland's homelessness response system.

Supervisor – Shelter-in-Place Hotel Site 10, San Francisco, CA: *March 2020 – July 2020*

Led Ambassador team supporting unhoused individuals placed in SIP hotels as part of the City's COVID-19 emergency response. Fostered a safe, welcoming environment rooted in respect and harm reduction. Supported day-to-day client needs, de-escalated conflicts, and liaised with case management and medical staff to ensure timely service delivery. Promoted trauma-informed engagement and modeled compassionate care under complex circumstances.

Ambassador – Embarcadero Navigation Center, San Francisco, CA: *January 2020 – March 2020*

Supported shelter guests at a low-barrier navigation center offering intensive case management and pathways to permanent housing. Provided frontline support, reinforced site safety, and built trust with residents through consistent, respectful engagement. Helped create a positive, responsive environment in alignment with Five Keys' trauma-informed, client-centered approach.

Beyond Violence / Chowchilla, CA

Healing Trauma Facilitator: 2018 – 2019

- Facilitated curriculum-based sessions focused on trauma healing and violence prevention for justice-involved individuals.

Program Clerk / Chowchilla, CA 2012 – 2018 and 1997 – 2009

- Provided clerical support to facility administrators and program officers.
- Recognized for professionalism, accuracy, and positive workplace demeanor.
- Supported command staff and program offices; handled correspondence and admin duties.
- Earned multiple commendations for work ethic and reliability.

Women's Advisory Council Vice Chairperson / Chowchilla, CA 2009 – 2011

- Acted as liaison between incarcerated women and facility leadership.
- Advocated for improved services and led initiatives to enhance facility conditions.

Education

Blackstone Career Institute, Allentown, PA | 2018–2019

- Paralegal Certificate

Coastline Community College, Fountain Valley, CA | 2006–2007, 2012–2016

- Social and Family Behavior AA
- Business AA
- American Studies AA
- Sociology AA
- Business Certificate AA

Associate of Arts Degrees (Honors) Feather River College, Quincy, CA | 2008–2010

- Behavioral Science and General Studies Associate in Arts Degree in Behavioral Science and General Studies, Honores

Additional Coursework

- Goodsoil Leadership Pathway 2024 - 6 month certification
Management and leadership skills, communication, change management, team building, coaching
- Sign Language 2010-2012
- Women in Prison 2007

Advocacy & Volunteer Work

- **Cardea Health** - Board Member at large
- **California Coalition for Women Prisoners (CCWP)** – Advocate
- **Restorative Justice & Youth Outreach** – Beyond Incarceration Program
Advocate for **sexually exploited and unhoused women**
- Active participant in **community-based public safety and housing reform**

Personal Statement

I bring lived experience and a deep commitment to my work with justice-impacted and unhoused populations. Through years of advocacy, facilitation, and leadership, I have developed a trauma-informed, equity-driven approach to service and systems change. I live and love what I do, and I remain committed to working for a more just, humane, and accountable system for all.

SAMANTHA EVANS

San Francisco, CA 94102 ♦ 408-876-0746 ♦ evanssamantha730@gmail.com

SUMMARY

Proven ability to lead teams, ensure regulatory compliance, and implement quality assurance measures that improve service delivery and operational efficiency. Seeking to advance into the role of Director of Compliance and QA, where I can leverage my expertise in program oversight, policy implementation, and performance evaluation to support organizational excellence and uphold the highest standards of care.

SKILLS

- Computer proficient in Microsoft Office and G Suite.
- Supervision and training staff
- Ability to assess and increase productivity in operations
- Quality Management Systems
- Strong management skills
- Works well in a fast paced environment
- Policy & Procedure Development
- Leadership: Ability to motivate, encourage and instruct others
- Flexibility: Able to work well under pressure and fast paced environments
- Ability to use time and resources effectively and efficiently
- Able to plan and account for all assigned tasks

WORK EXPERIENCE

[Fivekeys](#)- San Francisco, Ca

2024 to Present

Assistant Director

- Managed the largest site at Five Keys
- Executed all training logs
- Conducted one on one meetings with Ambassadors/Supervisors
- Paycom proficiency
- Enforced policy and procedures for all staff
- Trained and mentored new employees on operations
- Established team priorities, maintained schedules, and monitored performance.

[Fivekeys](#)- San Francisco, Ca

2022 to 2024

Supervisor

- De-escalation of potential client conflicts
- Inspecting the facilities to maintain security and program compliant
- Helping orient all participants to program rules and responsibilities of the Navigation Center
- Ensure compliance with the rules and regulations in a fair and equitable manner for all participants

[Checkr](#) - San Francisco, Ca

2021 to June 2024

Client Support Representative

- Help customers with questions and educate Checkr clients about the product and process best practices via email, phone, chat and other channels in a professional, empathetic manner
- Escalate complex issues to appropriate internal and external parties
- Provide feedback about how we can, as a team and company provide an industry leading customer experience

Avellino Labs – Menlo Park , CA

2021 to 2023

Lab Accessioner

- Support the clinical lab with sample intake
- Receive, unpack, login, organize, label, and distribute incoming clinical specimens
- Enter and verify data into lab database
- Prepare samples for testing
- Support administrative functions of the lab as required
- QC vials to ensure all samples meet requirements
- Follow all safety procedures, policies, and procedures

California Marketing Group – Dublin , CA

2015 to 2021

Quality Assurance Supervisor

- In charge of training for 200-Person Call Center
- Measured Call Center Productivity Metrics
- Maintain a formal quality assessment program in accordance with Program Statement
- Lead continuous evaluation and investigation of repetitive negative behaviors
- Implement Performance Improvement Plans to meet Quality standards
- Audit recorded calls to ensure agent compliance to customer expectations
- Maintain a comprehensive document control program
- Acted as center's subject matter expert in all issues related to Quality

EDUCATION

American Society of Quality - Dublin, CA 2020

Certificate: Quality Improvement Associate

Department of Labor - Dublin, CA 2017

5400 Hour Apprenticeship : Customer Service Representative

Heald College - Salinas, CA 2012

Courses in Applied Science : Medical Assistance

Sierra Nevada High School - Nevada City, CA 2009

High School Diploma

References Available Upon Request



Five Keys' holistic services model is rooted in collaborative partnerships. We created the Community Action Partnership Alliance (CAP Alliance) in 2015 and launched the Stockton chapter in San Joaquin County in 2021.

The Stockton Chapter of CAP Alliance is dedicated to helping formerly incarcerated individuals build stronger foundations for successful reintegration into society. The chapter offers a comprehensive range of support services, including job readiness programs, housing assistance, mentorship, and life skills training. Members work closely with local businesses, nonprofits, and community leaders to ensure that each individual has access to the resources they need for long-term stability and personal growth. Focused on reducing recidivism, the Stockton Chapter empowers returning citizens to rebuild their lives, contribute to their communities, and secure a brighter future. Together, we are creating pathways to success and fostering a more inclusive, supportive environment in Stockton.

While Five Keys provides a steady administrative backbone, local CAP chapters are intentionally not branded as projects of Five Keys so that they are self-guided by local members. The San Joaquin chapter has more than 50 members representing agencies, nonprofits, faith-based organizations, and businesses that work together to improve local reentry outcomes. The CAP Alliance frequently meets by Zoom and at our Stockton training center at 611 W. Fremont Street where we host meetings, job readiness trainings, and referral fairs for program participants. The site has a tech hub with computer workstations for online classes, work on resumes, and job seeking and housing searches, with on-site staff support.

This meeting space is also used for mock job interviews; CalJobs account signups; basic technology classes, and community-building. We host presentations from Friends Outside, El Concilio Social Services (such as how to restore a revoked Driver's License); Orientation to San Joaquin County WorkNet/EDD (to access job training and placement support); Union delegates providing workshops on trades laborer pathways; Sessions about the importance of CPR and OSHA certifications; Chase Bank financial literacy programs; and Community College orientations to the Phoenix Program for justice-impacted students.

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