



## **CITY OF RANCHO SANTA MARGARITA 2025-2026 COMMUNITY DEVELOPMENT BLOCK GRANT PUBLIC SERVICE GRANT APPLICATION**

**APPLICATION DUE DATE - 3:00 PM JANUARY 30, 2025**

Submit one original application to:

Mike Linares  
City of Rancho Santa Margarita  
22112 El Paseo Rancho Santa Margarita CA 92688

**Also, submit this Application Form (MS Word format) by the due date/time to:**  
**[mlinares@cityofrsm.org](mailto:mlinares@cityofrsm.org)**

Only complete applications will be considered. Use the checklist below to ensure your application package is complete. Ensure all required text fields and applicable boxes are completed or checked. Click on the appropriate box to insert text or checkmark; "Tab" from field to field to complete the application. Avoid hard returns within the text box. Narrative text fields are limited in space, so provide concise responses.

### **DO NOT MODIFY THE APPLICATION FORM**

Organization Legal Name: Family Assistance Ministry

Proposed Program Name: Housing Continuum

CDBG Amount Requested: \$20,000

.... Application (including Attachment A: Proposed Budget & Attachment B: Proposed CDBG-Funded Personnel)

**SUBMIT THE FOLLOWING MATERIALS AS PDF FILES ON A USB DATA STORAGE DEVICE (NO CD-ROMs)**

- .... Proposed Program Application or Intake Sheet
- .... IRS Tax-Exempt Documentation
- .... Current Board of Directors Roster
- .... Most Recent 990 Tax Filing (remove password protection)
- .... Most Recent Financial Statement & Audit (remove password protection)

**Do not submit testimonials, letters of support, or program literature.**

## **APPLICANT GENERAL INFORMATION**

A. Organization Legal Name: Family Assistance Ministries

B. Mailing Address: 1000 Calle Cordillera, San Clemente, CA 92673

C. Proposed Program Name: Housing Continuum

D. Check the **ONE** category that best describes the proposed program

Youth       Senior       Disabled Adults       Low/Mod General

Homeless       Fair Housing       Housing

E. Is this application submitted by a faith-based organization?  Yes       No

F. Is this request for a New  or Existing  program?

G. Location of where service will be provided (i.e., specify if the program is citywide, a street address, a school site, Census Tract/Block Group, etc.): FAM's Resource Centers in San Clemente and offices in Mission Viejo, San Juan Capistrano, Dana Point and Laguna Niguel

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H. Person to contact regarding this application:

Name: Jordon Diemert      Email Address: annac@lovefam.org

Telephone: 949-492-8477      Fax: 949-492-8081

I. Federal Tax ID Number: 33-0864870      UEI Number: FJS7D5YP7NA9

J. Organization officials that will execute the grant agreement (2 required):

Name: Anna Conti    Title: Chief Executive Officer    Email Address: annac@lovefam.org

Name: Jordon Diemert    Title: Director of Finance    Email Address: jordon@lovefam.org

## **2. COMMUNITY NEED FOR PROGRAM**

A. Summarize the nature and need for the proposed program in RSM. Include information regarding the characteristics of persons to be served (e.g., age, disability, income situation, and other distinguishing characteristics) and data that supports the unmet need for the proposed program in RSM. FAM offers Housing Continuum services to low-income and very low-income individuals and families who are residents of Rancho Santa Margarita, are at high risk for hunger and homelessness, or are already experiencing homelessness. According to 2024 Census data, 2,355 (5.1%) of Rancho Santa Margarita's 46,182 residents live in poverty. Of those considered extremely low-income, 1,005 pay more than 50% of their household income for housing. High housing cost burden is identified as the biggest housing problem in the city. According to the RSM 2020-2024 Consolidated Plan, renters with a high housing cost burden often fall behind on their rent or utilities as they attempt to make ends meet. For residents who are extremely low-income with a high cost burden, the entire household is at risk of homelessness. The RSM 2020-24 Consolidated Action Plan outlines a strategy prioritizing safety-net programs that help low-income individuals and families avoid homelessness. FAM offers an exceptionally effective safety net program that provides each client with a case manager who provides "best-fit" housing services tailored to the unique circumstances of the individual or family. The case manager provides financial counseling/assistance, makes referrals to appropriate social supports and develops a personalized plan to help residents regain self-sufficiency. When financial assistance is provided for rent or utilities, client need is first verified and then paid directly to landlords and service providers. Additionally, FAM provides nutritious food options, helping residents redirect funds they would have spent on food toward paying rent and utilities. FAM also leverages other internal services on behalf of CDBG clients, including diversion through Homeward Bound, a program that reconnects clients back to family or friends in other parts of the country. Based on the high number of RSM residents living in poverty who have an extremely high housing burden, the need for housing continuum services remains strong. Last fiscal year alone, FAM provided 233 RSM residents with 2,449 encounters to ensure housing stability. Those residents were provided 320 hours of case management and \$282,662.34 in client aid, including client aid through permanent supportive housing. We anticipate a similar or increased level of need in 2025-26.

B. Discuss if other organizations provide a similar service to RSM residents and how the proposed program differs or augments these similar services. Explain why this program is cost-effective compared to similar services provided by another agency. Other housing-related services for RSM residents are Families Forward, South County Outreach, and RSM Cares Food Pantry. Some unique aspects of FAM's services stand out in comparison due to our following qualities: i) Cost Effectiveness: FAM integrates food distribution, housing, and other services supported by 1,978 volunteers, contributing \$1,258,997 in value. By addressing multiple needs under one organization, we reduce administrative costs and service duplication. ii) Sustainability Focus: We prioritize sustainable outcomes by fostering self-sufficiency, offering comprehensive housing services (residential, short-term, transitional, and long-term), teaching financial literacy, providing rental/utility assistance, case management, and food for a holistic approach. iii) Localized Knowledge and Access: Having served the region of South Orange County since 1999, FAM has a deep understanding of the community's needs, culture, and challenges.

C. Provide the following information regarding the anticipated number of individuals to be served by the proposed program between **7/1/2025 and 6/30/2026**:

1. How many unduplicated individuals will benefit from the proposed activity **regardless of City of residence?** 400 Individuals
2. How many unduplicated RSM residents will the proposed activity assist? 45 Individuals
3. How many unduplicated lower-income RSM residents will the proposed activity assist with the requested CDBG funds? 45 Individuals

D. Provide a Performance Plan (Goals and Objectives) via a "breakdown" of the number of RSM residents to be served and the type of service(s) to be provided. Each resident serviced should be counted one time for the year and toward a single service category. See the sample below.

SAMPLE PERFORMANCE PLAN	
RSM Residents	Type of Service Provided
20	<i>Phone Referrals</i>
50	<i>Education / Outreach (community presentations, distribution of flyers, pamphlets, etc.)</i>
10	<i>Counseling Services</i>
5	<i>Direct Assistance (rental, transitional housing, legal services, emergency shelter, etc.)</i>
<b>85</b>	<b>TOTAL</b>

PROPOSED PERFORMANCE PLAN	
RSM Residents	Type of Service Provided
10	Case Management
5	Client Aid (Rental and Utility assistance)
30	Supportive services (phone referrals and resources)
<b>45</b>	<b>TOTAL</b>

E. From the list below, select one HUD-required "Objective" and one HUD-required "Outcome" that the proposed activity will address.

#### HUD Objectives

- Create a Suitable Living Environment: Activity designed to benefit the community, families, or individuals by addressing living environment issues.
- Provide Decent Affordable Housing: Housing activity designed to meet individual family or community housing needs.
- Create Economic Opportunities: Activity such as economic development or commercial revitalization that creates or expands job opportunities.

#### HUD Outcomes

- Availability/Accessibility: Services, infrastructure, housing, or shelter will be available/accessible to Low- & Moderate-Income people, including people with disabilities.
- Affordability: The activity will provide affordability for Low- & Moderate-Income people, including the creation/maintenance of affordable housing, basic infrastructure, or services.
- Sustainability (Promoting Livable or Viable Communities): The program/project will improve the community by making it livable or viable by providing benefits to Low/Moderate-Income people.

F. Regarding the "Outcome" selected above, describe how the success and effectiveness of the proposed services will be measured. Include a definition of success/effectiveness, tools to measure program success/effectiveness, and the percentage of individuals to be served that will meet the success/effectiveness threshold. Discuss steps to implement performance measures if outcome measurements are not in place. The goal of FAM's Housing Continuum—and our measure for success—is that those who are unhoused or at immediate risk of becoming unhoused will secure and maintain permanent housing. To measure performance outcomes, FAM records the following: i)-number of clients served; ii) total dollar value of aid distributed ; iii) number of case management hours iv) number of clients receiving referrals to internal or external services and resources, v) key client goals achieved. We measure qualitative success through tracking: i)-increases in financial literacy; ii) number of clients who are permanently housed; iii) number of clients who are diverted from being unhoused; and iv) increased access to needed services and resources. Our overall definition of success is that 90% of those we serve maintain their housing, alongside meaningful progress in key areas such as increased income and overall improved quality of life. We continuously monitor our performance and outcome measures to ensure we are on track to meet our goals. If we are not on track, a performance plan is implemented to remedy the issue.

### **3. ORGANIZATIONAL CAPACITY AND EXPERIENCE**

A. Summarize your organization's experience in carrying out the proposed program. Include information regarding the length of time providing service, staff professional qualifications (including license, academic credentials, etc.), and other relevant information. Since 1999, FAM has provided tailored housing services to low-income individuals and families with children, with the goal of securing and/or maintaining stable housing. Over this time, FAM has developed a very robust infrastructure, allowing it to provide a deep level of services for clients with the highest need. FAM has provided a number of services, including food aid, case management, financial assistance, intakes, assessments, referrals, housing, shelter, financial literacy, and much more. We currently offer services at nine locations throughout Orange County, and offer a continuum of housing programs, including interim/transitional and emergency shelters, rental and utility assistance, food, financial counseling, case management, and permanent supportive housing. FAM has many years of experience providing CDBG services and provides services in six cities. Based on FAM's past performance, we have proven our capacity to serve the community. FAM's professional staff is highly qualified to carry out the CDBG program. Our CEO, Anna Conti, MA, joined us in July 2023 with 18 years of senior management, C-Suite, and board leadership experience. Edgar Vargas, BA, has spent 8+ years working with vulnerable populations, with four of those in management and leadership positions. Edgar provides administrative oversight for FAM's CDBG program. Mercy Gordon, BA, is our Housing Sustainability Manager. She has over 20 years of case management experience. Her role is to oversee the case management team.

B. Has your agency previously received CDBG funding from the City of RSM? Yes  No

C. Summarize your organization's experience administering CDBG public service grant funds.

Name of City or County Providing Prior CDBG \$	Year Funds Received	CDBG Grant Amount	Program Funded
City of San Clemente	2024	\$13,275	Housing Continuum
City of Lake Forest	2024	\$12,300	Housing Continuum
City of Rancho Santa Margerita	2024	\$8,410	Housing Continuum

D. Are you requesting funding for this program from any other City or County?  
Yes  No  If "Yes," from whom and how much?

City/County	Funding Source	Amount Requested
City of Lake Forest	CDBG	\$20,000
City of Mission Viejo	CDBG	\$20,000
City of San Clemente	CDBG	\$20,000

E. Will volunteers, donated goods/services, and/or fundraising activities be used to supplement the proposed program? Yes  No  Summarize these efforts. FAM benefits significantly from donated goods and volunteer services, allowing more funds to be directed towards client services. In 2024, 1,978 volunteers provided essential support, contributing a total estimated value of \$1,258,997 (based on the 2024 California Volunteer Rate for the Independent Sector). Volunteers support FAM by assisting with phone support, client services, financial planning, job coaching, and community outreach. They also provide extensive help with food bank operations, including conducting food intakes, driving trucks to pick up fresh rescue food, and redistributing nutritious food to our clients. Last year, we redistributed 2.5 million pounds of nutritious food to hungry children and adults in our community. We also rely on in-kind donations of goods and services to support our programs. Additionally, we partner

with community organizations to offer services to clients, including early childhood development screenings, medical and dental care, financial counseling, haircuts, and referrals to other services as needed.

F. Financial/Administrative Audit:

1. In any one of the past 3 years, has your agency expended more than \$750,000 in federal funds during a fiscal year? Yes  No
2. During this year(s), did your agency prepare an audit compliant with OMB Circular A-133 or by an independent auditor? Yes  No  If "No," explain why an audit has not been conducted. \_\_\_\_\_

#### **4. PROGRAM INFORMATION AND BUDGET**

A. Complete the following budget summary for the proposed program.

1. 2025-2026 CDBG Grant Funds Requested:	<u>\$20,000</u>
2. Total 2025-2026 Program Budget:	<u>\$3,662,700</u>
3. Total 2025-2026 Budget for <u>all programs offered by your agency</u> :	<u>\$6,007,899</u>

B. Summarize how requested CDBG funds will be used (e.g., staff salaries, benefits, program supplies, insurance, direct client assistance, etc.). Include information on how requested funds will directly benefit RSM residents. (Ensure that **Attachment A, "Proposed Program-Budget,"** reflects this outline.)

All CDBG funds will be used to support low-to-moderate income RSM residents who are unhoused or at immediate risk of eviction. Of the overall CDBG budget, \$5,000 will be directed towards direct financial assistance, including rental assistance and utility payments, and \$15,000 towards the salaries of case managers and intake coordinator. Case managers provide essential client support, conduct initial assessments, and provide "best-fit" services to ensure the best possible outcomes. Services provided by case managers include financial counseling, workforce development, linkage to healthcare, food assistance, referrals, and other supportive services as needed.

C. Provide the following information regarding full-time, part-time, contract, and volunteer staff that will be utilized to provide the proposed service. (If CDBG funds are requested for personnel costs, **Attachment B, "CDBG Funded Personnel,"** must be completed.)

Full-Time staff:

3

Part-Time staff:

0

Contract staff:

0

Program volunteers:

1.978

## **5. CLIENT INTAKE INFORMATION**

A. HUD requires that each organization that provides services to individuals with CDBG public service grant funds document the size, race/ethnicity, and income of assisted households.

Does the proposed program application/intake form collect this information?

Yes  No

If "Yes," how is the information documented?

1. Self-Certification:
2. Analysis of household income documents such as tax returns/paychecks:

If "No," how will this information be collected and/or reported to the City? \_\_\_\_\_

*Note: Income documentation is not required but requested for "presumed beneficiary" category clients. Per HUD regulations, presumed beneficiaries include abused children, seniors (over 62 years of age), battered spouses, severely disabled adults, homeless persons, illiterate persons, persons with HIV/AIDS, and migrant farmworkers. Documentation of "presumed beneficiary" status is required.*

B. Will the proposed program exclusively serve presumed beneficiaries?

Yes, the proposed activity  No

If "Yes," list the category \_\_\_\_\_

## **6. CERTIFICATION**

I hereby certify that I am authorized to submit this application for CDBG public service grant funding provided by the City of Rancho Santa Margarita ("City") by the Board of Directors of **Family Assistance Ministry** ("Applicant"). If grant funds are granted, funds will be used solely to benefit low- and moderate-income Rancho Santa Margarita residents. Applicant understands that general liability, auto liability insurance, and workers' compensation insurance are required and will be provided per a grant agreement to be executed between the City and the Applicant. Applicant understands that grant funds are provided on a reimbursement basis and will provide appropriate documentation to substantiate expenditures submitted for reimbursement. Grant funds will be administered according to this agreement and consistent with applicable federal regulations. If the Applicant fails to serve eligible Rancho Santa Margarita residents during the term of the contract or fails to substantially attain projected accomplishments (defined as at least 75% of the projected number of persons to be served), Applicant may be required to repay all or a portion of funds already disbursed to the Applicant by the City and/or forego receipt of additional grant funds. The Applicant also certifies that it complies with all local zoning/land use regulations and possesses all required licenses and permits to operate/provide the program.

Name: Anna Conti

Title: CEO

Original signature and date on file

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Signature

Date

**ATTACHMENT A**  
**PROPOSED 2025-2026 PROGRAM BUDGET**

BUDGET CATEGORY	CDBG FUNDS	OTHER FUNDS	TOTAL FUNDS
Agency Administration Staff Salaries & Benefits	\$	\$507,800.00	\$507,800.00
Program Staff Salaries & Benefits	\$15,000.00	\$1,854,200.00	\$1,869,200.00
Program Supplies	\$	\$35,000.00	\$35,000.00
Rent/Lease	\$	\$270,700.00	\$270,700.00
Communications	\$	\$	\$
Utilities	\$	\$99,700.00	\$99,700.00
Insurance	\$	\$14,000.00	\$14,000.00
Professional Services (Specify)	\$	\$35,900.00	\$35,900.00
Other (Specify)	\$5,000.00	\$577,800.00	\$582,800.00
Other (Specify)	\$	\$247,600.00	\$247,600.00
Other (Specify)	\$	\$	\$
Other (Specify)	\$	\$	\$
<b>TOTAL</b>	<b>\$20,000.00</b>	<b>\$3,642,700.00</b>	<b>\$3,662,700.00</b>

**List Source of "Other" Program Funds**

SOURCE OF OTHER PROGRAM FUNDS	AMOUNT OF OTHER PROGRAM FUNDS	ARE FUNDS ALREADY SECURED VIA CONTRACT?
Business/Church/Individual Donation	\$1,156,200.00	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Fundraising	\$992,200.00	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Grants	\$3,446,999.00	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Retail/Other	\$412,500.00	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
	\$	Yes <input type="checkbox"/> No <input type="checkbox"/>
<b>TOTAL</b>	<b>\$6,007,899.00</b>	

**ATTACHMENT B**  
**PROPOSED CDBG FUNDED PERSONNEL**  
*(Only list staff for which CDBG funding is requested)*

Not Applicable – no CDBG funding is requested for staff.

**AGENCY ADMINISTRATION STAFF**

POSITION TITLE	ANNUAL SALARY	ANNUAL BENEFITS	TOTAL COMPENSATION	CDBG FUNDS REQUESTED	% OF TIME POSITION IS DEDICATED To RSM CDBG ACTIVITY
	\$	\$	\$	\$	%
	\$	\$	\$	\$	%
	\$	\$	\$	\$	%
	\$	\$	\$	\$	%
	\$	\$	\$	\$	%

**PROGRAM STAFF**

POSITION TITLE	ANNUAL SALARY	ANNUAL BENEFITS	TOTAL COMPENSATION	CDBG FUNDS REQUESTED	% OF TIME POSITION IS DEDICATED To RSM CDBG ACTIVITY
Case Manager	\$58,600.00	\$4,395.00	\$62,995.00	\$6,000.00	9.50%
Case Manager	\$58,600.00	\$4,395.00	\$62,995.00	\$6,000.00	9.50%
Intake Coordinator	\$54,080.00	\$4,395.00	\$58,475.00	\$3,000.00	5.10%
	\$	\$	\$	\$	%
	\$	\$	\$	\$	%

**PROGRAM CONTRACT STAFF**

POSITION TITLE	ANNUAL SALARY	ANNUAL BENEFITS	TOTAL COMPENSATION	CDBG FUNDS REQUESTED	% OF TIME POSITION IS DEDICATED To RSM CDBG ACTIVITY
	\$	\$	\$	\$	%
	\$	\$	\$	\$	%
	\$	\$	\$	\$	%