

July 28, 2022

Board of Commissioners
Clackamas County

Members of the Board:

Approval of Grant Amendment #1 from Community and Shelter Assistance (CASA) of Oregon to Sign Up Qualifying Low-Income Clients for Individual Development Accounts. Funded by CASA. CASA will Provide a \$36,000 Increase Direct to Eligible Clients and a \$4,680 Revenue Increase to County.
No County General Funds.

Purpose/Outcomes	Approval of Amendment #1, which increases the revenue to Social Services to administer the program by \$4,680 to a total of \$10,530 and increases the total direct to client payments by \$36,000 to a total of \$81,000.
Dollar Amount and Fiscal Impact	\$10,530 revenue to Social Services. \$81,000 direct to eligible clients' savings accounts.
Funding Source	Community and Shelter Assistance (CASA) of Oregon. No County match requirements. No County General Funds.
Duration	Amendment covers the grant expenditure period of April 1, 2021 to March 31, 2022.
Previous Board Action	The original agreement, was approved by the Board 7-8-2021. Item at County issues: 7-26-22.
Strategic Plan Alignment	1. This funding aligns with H3S's strategic priority to increase self-sufficiency for our clients. 2. This funding aligns with the County's strategic priority to ensure safe, healthy and secure communities.
Counsel Review	Approved by Counsel on 6/22/2022 by Andrew Naylor.
Procurement Review	1. Was the item processed through Procurement? No 2. If no, provide brief explanation: This is a grant amendment, not subject to Procurement review.
Contact Person	Brenda Durbin, Social Services Director (503)655-8641
Agreement Number	H3S# 10196

BACKGROUND:

The Social Services Division (SSD) of the Health, Housing, and Human Services Department requests the approval of Amendment #1 from CASA of Oregon to continue providing its Individual Development Account program to eligible housing program participants.

In partnership with the Housing Authority of Clackamas County, SSD provides low-income individuals and families with access to Individual Development Accounts (IDAs) to support their efforts to build assets. Clients with IDAs save money each month and receive matching funds deposited into their savings accounts direct from CASA. Clients can use the accumulated funds to purchase a home or a vehicle or pay for post-secondary education at the end of their savings agreement period. This is a successful, ongoing program that has helped low-income Clackamas County residents build financial stability.

Healthy Families. Strong Communities.

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Amendment #1 increases the amount available to clients from \$45,000 to \$81,000 and increases the amount to SSD to administer the program from \$4,680 to \$10,530. CASA provides the match direct to eligible clients. No match is required by the County. The reference to match refers to the deposits clients make that will be matched by CASA via a deposit into the clients' savings accounts.

County Counsel approved the Amendment. No County General Funds are required.

RECOMMENDATION:

Staff recommends the Board approval of this Grant Amendment, and authorization for Tootie Smith, Board Chair, to sign.

Respectfully submitted,

A handwritten signature in cursive script that reads "Rodney A. Cook".

Rodney A. Cook, Director
Health, Housing & Human Services Department

Attachment:
Grant Amendment #1, H3S#10196

**Article VII. Amendment to the Reservation of Matching Funds 2021
Clackamas County Social Services**

Section 7.01 At the beginning of each agreement year, the Administrator will reserve funds from the most recent Oregon IDA award to be used exclusively by Partner throughout the agreement year period. Funds may be distributed to participants at the discretion of Partner, until they run out or by January 31, 2022, at which point any remaining matching dollars will be reassigned. Partner may be able to access additional matching dollars prior to the end of the program year, should there be any available.

Section 7.02 Should a participant leave the program during this program year who was assigned to the current funding year, prior to using matching funds, Partner will be required to reallocate funds to a new applicant.

Section 7.03 Partner will be awarded \$81,000 in matching funds to be distributed in accordance with this agreement. These funds will reside with Administrator to be used exclusively for Partner during the term of this contract.

Section 7.04 Partner may choose to allocate any or all of these funds to support existing savers, new enrollments, or any combination of the two. Supporting existing savers with additional match would be called a Savings Plan Agreement Amendment.

CLACKAMAS COUNTY
Commissioner Tootie Smith, Chair
Commissioner Sonya Fischer
Commissioner Paul Sayas
Commissioner Martha Schrader

For: _____
Commissioner Mark Shull

By: Tootie Smith _____

Title: Chair _____

Date: _____

COVER SHEET

- New Agreement/Contract
- Amendment/Change/Extension to _____
- Other _____

Originating County Department: _____

Other party to contract/agreement: _____

Description:

After recording please return to: _____

- County Admin
- Procurement

If applicable, complete the following: _____

Board Agenda Date/Item Number: _____