

November 10, 2021

Board of Commissioners  
Clackamas County

Members of the Board:

Approval of Amendment #02 to a Subrecipient Agreement with Lifeworks NW for Intensive Case Management Services. Amendment adds \$44,301.60 to the Agreement, increasing the maximum grant value to \$354,412.80. Funding through State of Oregon, CMHP funds.  
No County General Funds involved.

<b>Purpose/Outcomes</b>	To provide Intensive Case Management (ICM) services to eligible Clackamas County residents.
<b>Dollar Amount and Fiscal Impact</b>	Amendment adds \$44,301.60, increasing the contract maximum value to \$354,412.80. Amendment ensures there will be no gap in services while a formal procurement process is conducted for these services.
<b>Funding Source</b>	No County General Funds are involved. State of Oregon, Community Mental Health Program (CMHP) funds are utilized.
<b>Duration</b>	Effective October 1, 2021 and terminates on December 31, 2021.
<b>Previous Board Action/Review</b>	Agreement reviewed and approved November 5, 2020, Agenda Item 110520-A2, and Amendment #01 July 29, 2021, Agenda Item 072921-A1.
<b>Strategic Plan Alignment</b>	Ensure safe, healthy and secure communities through the provision of mental health services.
<b>Counsel Review</b>	Reviewed and approved October 21, 2021 Andrew Naylor
<b>Procurement Review</b>	Was this item reviewed by Procurement? No Review not required for subrecipient agreements and amendments.
<b>Contact Person</b>	Mary Rumbaugh, Director – Behavioral Health Division – 503-742-5305
<b>Agreement No.</b>	9495 (20-035)

**BACKGROUND:**

The Behavioral Health Division of the Health, Housing & Human Services Department requests the approval of Amendment #02 to Subrecipient Agreement #9495 (20-035) with Lifeworks NW for providing Intensive Case Management (ICM) services to residents who are eligible Clackamas County residents. LifeWorks NW is a not-for-profit behavioral health agency that promotes a health community by provided quality and culturally responsive mental health and addiction services across the lifespan. The Behavioral Health Division has collaborated with Lifeworks Northwest for behavioral health services since 2005.

Intensive Case Management Services are provided with evidence-based, culturally and linguistically appropriate clinical services and strategies with support mental health recovery for Clackamas County clients. Services include, but are not limited to, mental health assessment,

treatment planning, coordination of care, client family and group therapy, mental health and addiction services, hospital discharge planning, psychiatric assessment and medication evaluation, management and/or monitoring, access to resources, support services, family support and education, and substance abuse services. As well as activities to promote symptom stability, physical health, and restoration of personal, community living and social skills.

This Amendment, effective October 1, 2021 through December 31, 2021, adds \$44,301.60 to the value of the Agreement. The Amendment is being issued to ensure that there is no gap in services while a formal procurement process is conducted.

**RECOMMENDATION:**

Staff recommends Board approval of this Amendment.

Respectfully submitted,

*Mary Rumbaugh*

Rodney A. Cook, Director  
Health, Housing and Human Services

## Subrecipient Amendment

Subrecipient Agreement Number: 20-035 A.2 (BH  
9495)

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Board Order Number: N/A

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Department/Division: H3S/Behavioral Health

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Amendment No. 02

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Subrecipient: LifeWorks NW

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Amendment Requested By: Mary Rumbaugh

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Changes:  Scope of Service  
 Agreement Time

Agreement Budget  
 Other: Update reporting contact

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### Justification for Amendment:

This Amendment #2 is entered into between LifeWorks NW ("Subrecipient") and Clackamas County ("County") and shall become part of that Subrecipient Grant Agreement ("Agreement") entered into between both parties on November 5, 2020. The purpose of this Amendment #2 is to extend the term of Agreement an additional three (3) months through December 31, 2021, and to add funds for the additional months of service.

The Agreement provides for Intensive Case Management services to Clackamas County clients.

Maximum compensation is **increased by \$44,301.60** to a revised value of **\$354,412.80**. This Amendment #2 is effective **upon signature** and continues through **December 31, 2021**.

Except as amended hereby, all other terms and conditions of the contract remain in full force and effect. The County has identified the changes with "***bold/italic***" font for easy reference.

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**AMEND Section 1 of the Agreement:**

1. **Term and Effective Date.** Pursuant to the terms of the grant award, this Agreement shall be effective **January 1, 2020** and shall expire on **September 30, 2021**, unless sooner terminated or extended pursuant to the terms hereof.

**TO READ:**

1. **Term and Effective Date.** Pursuant to the terms of the grant award, this Agreement shall be effective **January 1, 2020** and shall expire on **December 31, 2021**, unless sooner terminated or extended pursuant to the terms hereof.

**AMEND Section 4 of the Agreement:**

4. **Grant Funds.** COUNTY's funding for this Agreement is the 2019-2021 Intergovernmental Agreement for the Financing of Community Mental Health, Addiction Treatment, Recovery & Prevention, and Problem Gambling Services (Agreement No. 159159). The maximum, not to exceed, grant amount that COUNTY will pay is **\$310,111.20**. This is a rate-based agreement and disbursements will be made in accordance with the schedule and requirements contained in **Exhibit D: Required Financial Reporting and Reimbursement Request** and **Exhibit E: Performance Measures and Reporting**.

Failure to comply with the terms of this Agreement may result in withholding of payment. Funding for this Agreement is from the following sources:

4.1. **Federal Funds: \$310,111.20**

in federal funds are provided through the Intergovernmental Agreement for the Financing of Community Mental Health, Addiction Treatment, Recovery & Prevention, and Problem Gambling Services (Agreement No. 159159) (**CFDA 93.958**) issued to COUNTY by the State of Oregon acting by and through its OHA. The State of Oregon receives funds through the Mental Health Block Grant (MHBG) funds from the U.S. Department of Health and Human Services, Office of Substance Abuse and Mental Health Services Administration.

**TO READ:**

4. **Grant Funds.** COUNTY's funding for this Agreement is the 2019-2021 Intergovernmental **Agreements** for the Financing of Community Mental Health, Addiction Treatment, Recovery & Prevention, and Problem Gambling Services (Agreement No. 159159 **and 166036**). The maximum, not to exceed, grant amount that COUNTY will pay is **\$354,412.80**. This is a rate-based agreement and disbursements will be made in accordance with the schedule and requirements contained in **Exhibit D: Required Financial Reporting and Reimbursement Request** and **Exhibit E: Performance Measures and Reporting**.

Failure to comply with the terms of this Agreement may result in withholding of payment. Funding for this Agreement is from the following sources:

4.1. **Federal Funds: \$354,412.80**

in federal funds are provided through the Intergovernmental Agreement for the Financing of Community Mental Health, Addiction Treatment, Recovery & Prevention, and Problem Gambling Services (Agreement No. 159159 **and 166036**) (**CFDA 93.958**) issued to COUNTY by the State of Oregon acting by and through its OHA. The State of Oregon receives funds through the Mental Health Block Grant (MHBG) funds from the U.S. Department of Health and Human Services, Office of Substance Abuse and Mental Health Services Administration.

**AMEND the following portion of Exhibit B, Subrecipient Program Budget:**

Subrecipient shall be compensated a capacity payment, for **nine (9) slots**, of **\$14,767.20 per month**, not to exceed **\$310,111.20** for the term of the Agreement.

**TO READ:**

Subrecipient shall be compensated a capacity payment, for **nine (9) slots**, of **\$14,767.20 per month**, not to exceed **\$354,412.80** for the term of the Agreement.

**AMEND Section 2 of Exhibit D, Required Financial Reporting and Reimbursement Request:**

2. Requests for reimbursement shall be submitted by the **10th of the month** for the previous month. The final request for reimbursement shall be submitted by October 10, 2021 for September 30, 2021 expenses.

**TO READ:**

2. Requests for reimbursement shall be submitted by the **10th of the month** for the previous month. The final request for reimbursement shall be submitted by **January 10, 2022** for **December 31, 2021** expenses.

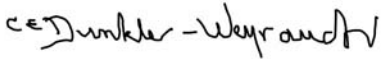
**[Signature page follows]**

**SIGNATURE PAGE**

IN WITNESS WHEREOF, the parties hereto have caused this Amendment #2 to be executed by their duly authorized officers.

**LIFEWORKS NW**

**COUNTY OF CLACKAMAS  
BOARD OF COMMISSIONERS**



10/19/2021

Authorized Signature

Date

Commissioner: Tootie Smith, Chair  
Commissioner: Sonya Fischer  
Commissioner: Paul Savas  
Commissioner: Martha Schrader  
Commissioner: Mark Shull

Connie Dunkle-Weyrauch, CFO/VP of Finance  
Name / Title (Printed)

\_\_\_\_\_  
Tootie Smith, Chair

\_\_\_\_\_  
Date

Approved as to form:



November 10, 2021

Board of County Commissioners  
Clackamas County

Members of the Board:

Approval of a Local Subrecipient Grant Agreement Amendment #3 with  
Metropolitan Family Services for continuation of Kindergarten Partnership Innovation Services  
in Clackamas County Agreement is increased by \$138,405.90 funded through Oregon Early  
Learning Division  
No County Funds are involved

<b>Purpose/Outcome</b>	Metropolitan Family Services (MFS) will continue to provide culturally-responsive Kindergarten Partnership Innovation (KPI) services that increase Kindergarten readiness for pre-kindergarten children and families living in Clackamas County. <ul style="list-style-type: none"> <li>• Ready Set Go!– a culturally responsive program to help transition children and their parents into kindergarten</li> <li>• Kindergarten Readiness – workshops for children and parents supporting ready kindergarten practices intended to build early literacy, critical thinking, and social/emotional skills</li> </ul>
<b>Dollar Amount and Fiscal Impact</b>	Amendment #3 adds \$138,405.90 for a maximum value of \$307,123.90 and extends the end date to June 30, 2023. No County General Funds involved.
<b>Funding Source</b>	State of Oregon, Dept of Education through its Early Learning Division - Kindergarten Innovation Partnership Grant
<b>Duration</b>	This amendment is effective October 1, 2021 for services ending June 30, 2023.
<b>Previous Board Action/Review</b>	Previous Board Action: 7/15/21 Board Issues Date: 11/9/21
<b>Strategic Plan Alignment</b>	1. Ensure safe, healthy and secure communities
<b>Counsel Review</b>	This Subrecipient Grant amendment has been reviewed and approved by County Counsel on 10/6/21, KR
<b>Procurement Review</b>	Was the item processed through Procurement? No. Subrecipient grant amendment, selected through a competitive process
<b>Contact Person</b>	Adam Freer 971-533-4929
<b>Contract No.</b>	CFCC 9477

**BACKGROUND:**

The Children, Family & Community Connections Division of the Health, Housing and Human Services Department requests approval of a Local Subrecipient Grant Amendment #3 with MFS for the

*Healthy Families. Strong Communities.*

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[www.clackamas.us](http://www.clackamas.us)

continuation of KPI services. MFS was selected through a competitive process in 2019 to provide culturally responsive evidence-based Early Learning programming and workshops to children and families to support a smooth transition into Kindergarten and strengthen connections and collaborations between the early care and education sector systems.

This Local Subrecipient Grant Agreement Amend #3 is effective upon signature by all parties for services starting on October 1, 2021 and terminating on June 30, 2023. This Amendment #3 adds \$138,405.90 for a maximum value of \$307,123.90.

**RECOMMENDATION:**

Staff recommends the Board approval of this Agreement and authorization for Tootie Smith, Board Chair, to sign on behalf of Clackamas County.

Respectfully submitted,

*Mary Rumbaugh*

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



Local Subrecipient Grant Amendment (FY 21-22)  
**H3S – Children, Family & Community Connections Division**

<u>Local Recipient Agreement Number: 9477</u>	<u>Board Order Number: 071521</u>
<u>Department/Division: H3S-CFCC</u>	<u>Amendment No. 3</u>
<u>Local Recipient: Metropolitan Family Services</u>	<u>Amendment Requested By: Adam Freer</u>
Changes: <input type="checkbox"/> Scope of Service	<input checked="" type="checkbox"/> Agreement Budget
<input checked="" type="checkbox"/> Agreement Time	<input type="checkbox"/> Other:

**Justification for Amendment:**

This Amendment #3 is entered into between Metropolitan Family Services (“SUBRECIPIENT”) and Clackamas County (“COUNTY”), acting by and through its Health, Housing & Human Services Children, Family and Community Connections (CFCC) Division and shall become part of that Subrecipient Grant Agreement (“Agreement”) entered into between both parties on October 28, 2019.

Metropolitan Family Services (MFS), a local non-profit organization, was selected through a competitive process in 2019 to provide community and school partnerships and innovations that result in measureable increases in readiness for pre-kindergarten children aged 3-5 years living in North Clackamas County.

This Amendment #3 adds to the maximum compensation and extends the end date for continuity of program service delivery to provide culturally responsive evidence-based Early Learning programming and workshops to children and parents to support a smooth transition into Kindergarten and strengthen connections and collaborations between the early care and education sector systems.

Maximum compensation is increased by \$138,405.90 for a revised maximum of \$307,123.90. Amendment #3 becomes effective when it is fully executed for services beginning October 1, 2021 and terminating on June 30, 2023.

Except as amended hereby, all other terms and conditions of the contract remain in full force and effect. The County has identified the changes with “***bold/italic***” font for easy reference.

**Amend Recital:**

2. **SUBRECIPIENT** will facilitate Ready Set Go! and Make Parenting a Pleasure family workshops. These workshops are culturally responsive-programs dedicated to help transition children and their parents into kindergarten. These Early Learning models bring children, caregivers and parents together in a rich learning environment through parent-child interaction groups, home visits, story times, evening family activities and engagement events, and kindergarten readiness workshops for family’s pre-kindergarten aged children as outlined in Exhibit A-1: Scope of Work, Exhibit A-2 Performance Reporting Schedule and Work Plan Quarterly Report.

**To Read:**

2. **SUBRECIPIENT** will ***continue to facilitate family workshops***. These workshops are culturally responsive-programs dedicated to help transition children and their parents into kindergarten. These Early Learning models bring children, caregivers and parents together in a rich learning environment through parent-child

interaction groups, home visits, story times, evening family activities and engagement events, and kindergarten readiness workshops for family’s pre-kindergarten aged children as outlined in Exhibit A-1: Scope of Work, Exhibit A-2 Performance Reporting Schedule and Work Plan Quarterly Report.

**AMEND:**

1. **Term and Effective Date.** This Agreement shall become effective on the date it is fully executed and approved as required by applicable law. Funds issued under this Amendment may be used to reimburse SUBRECIPIENT for expenses approved in writing by County relating to the project incurred no earlier than July 1, 2021 and not later than September 30, 2021, unless this Agreement is sooner terminated or extended pursuant to the terms hereof. No grant funds are available for expenditures after the expiration date of this Agreement.

**TO READ:**

1. **Term and Effective Date.** This Agreement shall become effective on the date it is fully executed and approved as required by applicable law. Funds issued under this **Amendment #3** may be used to reimburse SUBRECIPIENT for expenses approved in writing by County relating to the project incurred no earlier than **October 1, 2021 and not later than June 30, 2023**, unless this Agreement is sooner terminated or extended pursuant to the terms hereof. No grant funds are available for expenditures after the expiration date of this Agreement.

**AMEND:**

2. **Grant Funds.** COUNTY’s funding for this Agreement is the State of Oregon acting by and through its Department of Education, Early Learning Division issued to COUNTY (\$156,325) and Oregon State University Student Success Act funds (\$12,393). The maximum, not to exceed, grant amount COUNTY will pay on this agreement is \$168,718.

**TO READ:**

2. **Grant Funds.** COUNTY’s funding for this Agreement is the State of Oregon acting by and through its Department of Education, Early Learning Division issued to COUNTY (**\$294,730.90**) and Oregon State University Student Success Act funds (\$12,393). The maximum, not to exceed, grant amount COUNTY will pay on this agreement is **\$307,123.90**.

**ADD:**

**Exhibit A-1 SCOPE OF WORK**

**EXHIBIT A-1  
SCOPE OF WORK (October 1, 2021-June 30, 2023)**

**PROGRAM GOALS**

Kindergarten Readiness Partnership & Innovation Program is intended to:

- I. Promote community and school partnerships that improve children’s readiness for kindergarten, in alignment with the goals, objectives, and strategies in *Raise Up Oregon* (<https://oregonearlylearning.com/raise-up-oregon>).
- II. Strengthen connections and collaboration between the early care and education sector and local kindergarten-grade 12 (k-12) systems and schools by investing in innovating and promising models for early learning/K-12 integration across the state that can be scaled and replicated.
- III. Build a body of evidence that Oregon can use to create stronger alignment between its early care and education and K-12 sectors.

**PROGRAM ACTIVITIES**

Metropolitan Family Services **will continue** to offer Ready Set Go! workshops. Ready Set Go! is a culturally responsive early learning model that brings children (three to five years old) and their caregivers together in a rich learning environment where Parent-Child Interaction Groups, Parenting Groups, and Community Engagement are designed to support a smooth transition into Kindergarten and lifelong success.

**Kindergarten Readiness:** Workshops for children and parents supporting ready for kindergarten practices intended to build early literacy, critical thinking, and social/emotional skills.

**Ready Set Go!:** families in North Clackamas will receive home visits or individual meetings to connect them with behavioral, social, emotions, or community resources to meet the needs of their children and family situation.





be facilitated in person or virtually.	functioning, parent/child relationship or parenting knowledge /skills. (measured by Workshop Evaluation and/or PSL)									
Kindergarten eligible children participating in RSG pre-k programs will be connected with their local elementary school prior to June 30, 2023	85% of eligible RSG children will be registered for kindergarten by June 30, 2021	# Children eligible to register for kindergarten								
		# Children registered for Kindergarten by June 30, 2023								
By June 30, 2023, a minimum of 60 RSG families will be served through in home visits or individual meetings. Individual meetings must be at least 20 minutes in length.	5% of families who were provided with home visits/individual meetings will be connected to behavioral, social, emotional or community resources meeting the needs of their children and family situation	# Families receiving home visits, individual meetings								
		# Families connected to behavioral, social, emotional, community resources/supports that meet their needs								

## Reporting Requirements

### **Monthly report, general ledger and reimbursement request**

- No later than the 15th of every month
- Chelsea Hamilton ([chamilton@clackamas.us](mailto:chamilton@clackamas.us)) and Stephanie Radford ([sradford@clackamas.us](mailto:sradford@clackamas.us))

### **Quarterly Report and Demographic Data Form & Project Testimonial**

- Program reports are due by the 15<sup>th</sup> of the month following the close of each quarter.
- Final programming reporting for the contract must be completed by July 15, 2023.

### **Testimonial or story**

Please provide two testimonials or stories related to your quality work with families for each site you provide services. Completed testimonial due by July 15, 2023 but may be submitted at any time. Your testimonial page serves as a platform to demonstrate how this project has facilitated innovative approaches for linking Early Learning with K-12 education. It is an opportunity to highlight your organization and the impact of your work in the community through this project. Testimonials will be presented to The Early Learning Hub Council as a part of the final report.

### **Creation and Distribution of Educational Materials and Resources**

Please send all program marketing materials to [chamilton@clackamas.us](mailto:chamilton@clackamas.us) prior to community distribution. Please include the Early Learning Hub of Clackamas County logo on all materials developed for programs funded through this contract.

**ADD:**

Exhibit B: Budget

<b>EXHIBIT B: BUDGET</b>			
<b>MFS- KPI Amend 3</b>			
<b>Organization:</b>	<b>Metropolitan Family Services</b>		
<b>Funded Program Name:</b>	<b>KPI</b>	<b>Contract:</b>	<b>9477 - Amend 3</b>
<b>Program Contact:</b>	<b>Amy Corbett</b>		
<b>Agreement Term:</b>	<b>October 1, 2021 - June 30, 2023</b>		
<b>Approved Award Budget Categories</b>	<b>Budget (10/1/21-6/30/23)</b>	<b>Approved Budget</b>	<b>Match</b>
<b>Personnel</b> (List salary, FTE & Fringe costs for each position)			<i>No match is required on this award</i>
Program Manager .125 FTE	\$ 14,016.02	\$ 14,016.02	
Program Coordinator .90 FTE	\$ 76,901.76	\$ 76,901.76	
Program Assistant			
Fringe	\$ 24,702.12	\$ 24,702.12	
<b>Total Personnel Services</b>	<b>\$ 115,619.90</b>	<b>\$ 115,619.90</b>	
<b>Administration</b>			
Materials/Supplies	\$ 2,400.00	\$ 2,400.00	
<b>Additional (please specify)</b>			
Professional Development/training/Conferences	\$ 3,000.00	\$ 3,000.00	
Client assistance (bus tickets, etc.)		\$ -	
<b>Total Programmatic Costs</b>	<b>\$ 5,400.00</b>	<b>\$ 5,400.00</b>	
<b>Admin: 15% Of Personnel and Program Costs</b>	<b>\$ 17,386.00</b>	<b>\$ 17,386.00</b>	
<b>Total Grant Costs</b>	<b>\$ 138,405.90</b>	<b>\$ 138,405.90</b>	



**ADD:**

Exhibit D-1 Reimbursement Request

Exhibit D-1: KPI A3 REIMBURSEMENT REQUEST				
Requests for reimbursement and supporting documentation are due monthly by the 15th of the month, including: <ul style="list-style-type: none"> <li>• Request for Reimbursement with an authorized signature</li> <li>• General Ledger backup to support the requested amount</li> <li>• Monthly Activity Report (Exhibit D-2) showing numbers served and activities conducted during the month of request (The Monthly Activity Report is NOT required on months when quarterly reports are due) .</li> </ul>				
<b>Contractor:</b>	Metropolitan Family Services			
<b>Address:</b>	1808 Belmont St		<b>Report Period:</b>	
	Portland, OR 97214			
<b>Contact Person:</b>	Amy Corbett		<b>Contract: KPI 9477 Amend 3</b>	
<b>Contract Period:</b>	October 1, 2021-June 30, 2023			
Budget Category	Approved Budget (10/1/21-6/30/23)	Current Draw Request	Previously Requested	Balance
<b>Personnel</b>				
Program Manager .125 fte	\$ 14,016.02	\$ -	\$ -	\$ 14,016.02
Program Coordinator .95 fte	\$ 76,901.76	\$ -	\$ -	\$ 76,901.76
Progrant Assistant				
Fringe	\$ 24,702.12	\$ -	\$ -	\$ 24,702.12
<b>Total Personnel</b>	<b>\$ 115,619.90</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 115,619.90</b>
<b>Administration</b>				
Administration 15% (combined personnel & program)	\$ 17,386.00	\$ -	\$ -	\$ 17,386.00
<b>Total Administration</b>	<b>\$ 17,386.00</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 17,386.00</b>
<b>Program</b>				
Materials & Supplies	\$ 2,400.00	\$ -	\$ -	\$ 2,400.00
<b>Additional (please specify)</b>				
Professional Development (training/conferences)	\$ 3,000.00			\$ 3,000.00
Client Assistance				\$ -
<b>Total Program</b>	<b>\$ 5,400.00</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 5,400.00</b>
<b>Total Grant Funds Requested</b>	<b>\$ 138,405.90</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 138,405.90</b>
By signing this request, I verify that the information on this Funds Request and attachments is accurate, represents contracted services, and is true to the best of my knowledge. Clackamas County retains the right to inspect all financial records and other books, documents, papers, plans, records of shipments and payments and writings that are pertinent to this Contract.				

IN WITNESS WHEREOF, the parties hereto have caused this Amendment to be executed by their duly authorized officers.

**AGENCY**

Metropolitan Family Services, Inc.  
1808 SE Belmont  
Portland, OR 97214

By: Judy Strand  
Judy Strand, CEO

Date: 10/22/2021

**CLACKAMAS COUNTY**

Commissioner: Tootie Smith, Chair  
Commissioner: Sonya Fischer  
Commissioner: Paul Savas  
Commissioner: Martha Schrader  
Commissioner: Mark Shull

Tootie Smith, Board Chair  
Clackamas County

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