

September 7, 2023

BCC Agenda Date/Item: \_\_\_\_\_

Board of County Commissioners  
Clackamas County

**Approval of Amendment #1 expanding the scope of work and increasing the value of a personal services contract with Clackamas Women’s Services for homeless services. Amendment value is \$4,180,204 for one year. Agreement value is increased to \$7,542,163 for two years. Funding of \$1,323,955 is through Supportive Housing Services Funds, \$2,770,000 in Emergency Order Funds, and \$86,249 in budgeted County General Funds.**

<b>Previous Board Action/Review</b>	December 15, 2022 – 20221215.III.A – Original Contract approved December 15, 2022 – 20221215.V.F.6 - Assignment Addendum approved Briefed at Issues – September 6, 2023		
<b>Performance Clackamas</b>	1. This funding aligns with H3S’s Strategic Business Plan goal to increase self-sufficiency for our clients. 2. This funding aligns with the County’s Performance Clackamas goal to ensure safe, healthy, and secure communities.		
<b>Counsel Review</b>	Yes	<b>Procurement Review</b>	No
<b>Contact Person</b>	Vahid Brown, HCDD Deputy Director	<b>Contact Phone</b>	(971) 334-9870

**EXECUTIVE SUMMARY:** On behalf of the Housing and Community Development Division (“HCDD”), Health, Housing & Human Services requests approval of Amendment #1 to Contract #10919 with Clackamas Women’s Services (“CWS”) to expand the scope of work and increase the contract value.

Clackamas Women’s Services has nearly 40 years of experience providing services to Clackamas County residents. Their organization offers various trauma-informed, wrap-around services for those escaping interpersonal violence.

On January 19, 2023, Governor Tina Kotek issued Executive Order 23-02 (the “EO”), which declared a state of emergency due to homelessness. Clackamas County was awarded EO funds to provide Rapid Rehousing (Connections to Stable Housing) Services to residents experiencing homelessness in the Clackamas County

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region. Clackamas County will use EO funds in the amount of \$2,770,000 to add rapid rehousing services to the existing contract with CWS, with program capacity to serve approximately 130 households.

In addition to the incorporation of EO funds and programming, this amendment also incorporates into this contract general funds in the amount of \$86,249. CWS has historically received these general funds to support its shelter for households fleeing domestic and sexual violence through a contract with the Children, Family, and Community Connections Division (CFCC). The incorporation of these funds and programming into this agreement is being done as part of the consolidation of housing services under HCDD.

Additionally, Amendment #1 adds Supportive Housing Services funding for adjustments to CWS's pay scale that will improve recruitment and retention, an increase in program capacity for supportive housing case management from 88 households per year to 150 households per year, and for the provision of rapid rehousing services, with program capacity for approximately 50 households.

This amendment is funded through Supportive Housing Services Funds of \$1,323,995, \$2,770,000 in Emergency Order 23-02 Funds, and \$86,249 in County General Funds budgeted for homeless services.

**RECOMMENDATION:** Staff respectfully recommends the Board approve Amendment #1 to Contract #10919 between Clackamas Women's Services and Clackamas County to provide housing navigation and placement, shelter, supportive housing case management, and rapid rehousing services for Clackamas County residents experiencing homelessness.

Respectfully submitted,



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

**AMENDMENT #1  
TO THE CONTRACT DOCUMENTS WITH CLACKAMAS WOMEN’S SERVICES  
Contract #10919**

This Amendment #1 is entered into between **Clackamas Women’s Services** (“Contractor”) and **Clackamas County** (“County”) and shall become part of the Contract documents entered into between both parties on December 15, 2022 (“Contract”).

The Purpose of this Amendment #1 is to make the following changes to the Contract:

1. ARTICLE I. Section 1. **Effective Date and Duration** is hereby amended as follows:

The Contract term ends on **June 30, 2024**. The Contract may be extended, upon execution of a written amendment(s) by both parties, for up to three (3) one-year terms.

Prior to consideration of any additional optional renewal, the County will provide Contractor with an allocation amount of funds County has determined are available for the one-year renewal term. Upon receipt of the allocation amount, the Contractor will submit a proposed annual budget to the County based on that amount. The County may either agree to the proposed annual budget and exercise the renewal, negotiate with Contractor to use a different proposed annual budget, or reject the proposed annual budget and decline to renew the Contract.

2. ARTICLE I. Section 2. **Scope of work** is hereby amended as follows:

Contractor will perform additional services as part of the Work. The additional services, together with existing Work, are set forth in the revised **Exhibit A – Scope of Work**, attached hereto and incorporated by this reference herein.

3. ARTICLE I. Section 3. **Consideration** is hereby amended as follows:

In consideration for Contractor performing Work, as amended, County agrees to pay Contractor, from available and authorized funds, an amount not to exceed \$4,180,204 for Work performed during FY 23-24. The total Contract compensation shall not exceed \$7,542,163.

Consideration rates are on a reimbursement basis in accordance with the budget set forth in Exhibit C of this Amendment #1, and the terms and conditions of the Contract. Should the Contract be extended by annual renewal, Exhibit C will be updated, as needed, to reflect the budget amount for each renewal year.

Budget line items within categories may be changed with written agreement by both parties. County may approve, in writing, adjustments to budget line item amounts provided the maximum Contract amount is not exceeded.

ORIGINAL CONTRACT	\$ 3,361,959
<u>AMENDMENT #1</u>	<u>\$ 4,180,204</u>
<b>TOTAL AMENDED CONTRACT</b>	<b>\$ 7,542,163</b>

4. ARTICLE II. Section 4. **Invoices and Payments** is hereby amended as follows:

In addition to the requirements outlined in the original Contract, Contractor will invoice the County separately for Rapid Rehousing Work to be reimbursed from funds issued under that certain grant agreement between the County and the State of Oregon (“Grant”), described as the State of Emergency Due to Homelessness Grant Agreement No. OR-507, a copy of which is attached hereto as Exhibit I. Contractor will use the separate invoice template provided by the County for this specific Work.

5. ARTICLE II. Section 31. **Reporting Requirements** is hereby amended as follows:

For Work funded by the Grant, County will set up additional reporting requirements in compliance with Exhibit I to this Amendment #1 – Agreement No. OR-507 (“EO”) and Exhibit J to this Amendment #1 – EO 23-02 – Process for System Administrators, attached hereto and incorporated by this reference herein.

For Work funded by the Grant, Contractor will comply with additional reporting requirements, under Exhibit J to this Amendment #1– EO 23-02 – Process for System Administrators, attached hereto and incorporated by this reference herein, as set up by the County.

The County will provide appropriate training to assist Contractor and any Subcontractors with new systems needed to complete the additional reporting requirements. Contractor and any Subcontractors shall participate in County’s trainings provided; however, participation in such training shall not supplant nor relieve Contractor its obligations under this Contract.

As HMIS Administrator the County will notify the Contractor and any subcontractors of data entry or quality issues and the Contractor will hold any subcontractors accountable through the subcontract agreements.


6. ARTICLE II is hereby amended to add the following additional terms and conditions:

33. Compliance with Grant. In performing the Work, Contractor shall comply with all terms and conditions of the Grant, including all exhibits thereto. Contractor shall further require any approved subcontractor to comply with the terms and conditions of the Grant, including all exhibits thereto.

Except as expressly amended above, all other terms and conditions of the Contract shall remain in full force and effect. By signature below, the parties agree to this Amendment #1, effective upon the date of the last signature below.

**Clackamas Women’s Services**

**Clackamas County**

  
08/23/2023  
\_\_\_\_\_  
Authorized Signature                      Date  
Melissa Erlbaum, Executive Director

\_\_\_\_\_  
Tootie Smith, Clackamas County Board Chair

\_\_\_\_\_  
Name / Title (Printed)

\_\_\_\_\_  
Date

211960-19  
\_\_\_\_\_  
Oregon Business Registry #  
501c3      Oregon

Approved as to form:

\_\_\_\_\_  
Entity Type / State of Formation

  
\_\_\_\_\_  
Andrew Naylor

Date: 08/24/2023

*Attachments: Exhibit A – Scope of Work; Exhibit C – Budget; Exhibit G – Use of SHS Client Services Flexible Funding; Exhibit I - Agreement No. OR -507 with Amendment #1; Exhibit J – EO 23-02 – Process for System Administrators.*

**EXHIBIT A  
PERSONAL SERVICES CONTRACT  
SCOPE OF WORK**

**Emergency Shelter Services Program Design**

Clackamas Women’s Services (“Contractor”) will operate an emergency shelter in Clackamas County. In addition, Contractor will provide supportive services to up to 6 households per month staying in hotel/motel-based emergency shelter units. Contractor’s shelter model will incorporate access to resources, reduction of housing barriers, partnering with housing and community agencies, and connecting participants to mainstream services and transitional and permanent housing. Contractor will participate in or facilitate “warm hand off” of housing navigation and/or rental assistance resources.

This program will work with the HST Outreach and Engagement and Safety off the Streets (O&E/SoS), Navigation (NAV), and Supportive Housing Case Management (SHCM) Program Coordinators to provide engagement, problem solving, matching, warm hand-offs to services, and re-location assistance and support as needed.

Referrals for this program will come from Coordinated Housing Access (CHA), street outreach programs, the statewide DVSA provider system, and through coordination with HST staff. Contractor will work with the HST to establish and/or approve prioritization policies. These services will be restricted to within the Metro jurisdictional boundary.

Housing First Aid/diversion, a client focused minimal intervention approach, will be meaningfully attempted with each participant; Housing First Aid/diversion training will be provided by the Housing Services Team (HST). Providing CHA screenings, assisting with by-name list (BNL) efforts, and collecting information for the Built for Zero initiative are required as a shelter provider. Built for Zero is an initiative led by national non-profit Community Solutions of which Clackamas County is a participant, and through which Community Solutions provides technical support to the County in developing quality by-name data on people experiencing homelessness and local collaboration efforts dedicated to ending homelessness locally.

The shelter program will be time-limited, working toward a goal of moving participants to safe, stable permanent housing resources within an average of 45 days from move-in. **Contractor will serve an average of 100 households annually.** While 45 days is the goal, it is not a time limit. Families will be provided with the option to sleep together; families will not be separated unless they choose to sleep separately.

Children residing in shelter will receive assistance attending former or neighborhood school. Emergency shelter programs must provide a place to stay 24 hours/day, 365 days a year. All shelter programs will be connected to or partner with housing navigation and placement services, long-term supportive housing case management, and rental assistance to connect participants with and help maintain permanent housing. The HST will facilitate connections, as needed. Contractor will be responsible for directly paying for hotel rooms. Contractor must provide connections to housing navigation and supportive housing case management services, rental

assistance resources, and complete both Supportive Housing Services and Coordinated Housing Access screening.

Services offered by Contractor must be voluntary for participants and must be based on participants' stated needs and preferences.

On-site amenities must include and easily accessible, but are not limited to:

- Access to telephone, computer, and internet
- Toilets, showers, and hygiene supplies
- Laundry facilities
- Storage for belongings

Contractor will provide all services reasonably necessary to run the Program. These services include, but are not limited to:

- Direct staff support for securing food, transportation, and other basic services for households in 33 shelter beds.
- Shelter intake/CHA assessment completion
- Housing First aid/shelter diversion
- Work with each participant to obtain appropriate documents to access housing, employment, and other needed services, considering the needs of immigrant populations.
- Individualized resource referral and connection, including mental and physical health, as needed.
- Provide at minimum weekly check-ins with households residing in the hotel and motel-based shelter. More frequent, if possible, to ensure safety of participants staying in program.
- Interface with hotel owners during occupancy to resolve any misunderstandings or disagreements between owners and occupants. Contact HST staff for additional facilitation or support.
- In partnership with navigation contractors, assist in addressing housing barriers, needs, and preferences of participants. Including completion, submission, and tracking of housing documents or applications.
- Develop a process in coordination with HST, to follow up with households exiting shelter programs to homelessness. Assure adequate connections to services after program exit.
- Support participants in self-advocacy efforts and identify opportunities to add participant voice to policy discussions.

In addition to the above, Contractor agrees to accomplish the above work under the following terms:

- Mobile Staff services available to all participants residing in hotel rooms through this program, with information on after hours contact options readily available to participants.
- Open shelter beds must be accessible on weekends and holidays.
- Comply with all relevant health, fire and life safety codes from the local fire marshal and the jurisdiction with permitting authority.

- Have rules to ensure a safe environment for all staff and clients. These rules must be in plain language and as streamlined as possible. See program coordinator for additional policy support.
- Shelters may not categorically exclude persons fleeing domestic violence.
- Contractor will document and certify eligibility of each adult household member as either Population A or Population B, in accordance with Exhibit F.
- May not require shelter guests to be clean and sober or pass urinalysis or breath testing. However, shelters may have rules disallowing alcohol or drug possession or use on shelter premises. Additionally, shelters must incorporate harm reduction into their service delivery.
- Actively participate in training, coordination, case conferencing and other meetings as required by HST.
- All uses of flexible funds for client services must adhere to the then-current Clackamas County Supportive Housing Services Flexible Funding Use Guidelines (“Guidelines”). A copy of the Guidelines in effect as of the date of this Contract is, attached hereto as Exhibit G and incorporated by this reference herein. The County may update these Guidelines. When the County updates the Guidelines, it will notify Contractor of the changes.

### Shelter Services Goals and Benchmarks

Outcome	Goal	Data Source
Data Completeness	95% of data quality across all HMIS data elements	HMIS
Housing First Aid/Diversion	At least 10% of those referred to or seeking shelter are provided with Housing First Aid to find other safe, temporary shelter or long-term options, diverting them from entering the shelter.	HMIS
Effective Services	Average length of program participation below 90 days, with a goal to reduce to 45 days. Average time from entry to connection to housing resource within 30 days.	HMIS HMIS
Ending Homelessness	At least 75% of households enter to a permanent or transitional (more than 90 day stay) housing option after engaging with contractor	HMIS



### ***Benchmarks and timeline***

1. Make all reasonable efforts to hire and have 100% of staff within 90 days of contract execution.
2. Complete HMIS training for at least one staff member within 90 days of contract execution
3. All program staff to complete Housing First Aid/Diversion training within 180 days of contract execution.
4. Submit agency program manual and policies within 180 days of contract execution.
5. Staff will participate in Built for Zero (BFZ) case conferencing within 30 days of being hired.
6. Staff complete RLRA training and attend an RLRA Orientation within 30 days of being hired.

The program must work toward meeting the goals, follow the timeline, and meet each benchmark above, as indicated.

### **Unmet benchmarks and lack of progress toward meeting goals will result in the following progressive action:**

- First time missing a benchmark/not making progress on goals.
  - Monitoring meetings with HST to identify barriers and possible solutions.
- Second time missing a benchmark/not making progress on goals.
  - Another monitoring meeting which will result in a mutually agreed upon Performance Improvement Plan (PIP)
- Third time missing a benchmark/not making progress on goals.
  - Another monitoring meeting, including an evaluation of PIP, with all remedies, up to and including Contract termination, available.

HST will use HMIS and training enrollment data to verify benchmark achievement. Contractor is expected to notify HST through email within 14 days once staff are hired and if there are challenges in meeting any of the benchmarks or goals above.

### **HST Benchmark and Timeline responsibilities**

1. Incorporate and adhere to the guiding principles and expectations set forth below.
2. Adhere to all applicable Fair Housing laws.
3. Support Contractor in creating policy manual, including sharing examples among Contracted providers.
4. Provide semi-annual “data progress reports” pulled and analyzed from HMIS, including equity data.
5. Provide HMIS access, training, and support.
6. Provide connections to CHA and Housing First Aid/diversion training.
7. Coordinate, support, and/or facilitate provider meetings, including case conferencing meetings, as needed.
8. Provide information, access, and/or support for staff to attend Equity, Inclusion and continuing education training.
9. Connect all contracted programs with the overall system of services for people experiencing homelessness.

10. Support both formal and informal partnerships between provider organizations, including those newly formed.
11. Facilitate connections to broader systems of care, including but not limited to:
  - a. Housing
  - b. Workforce
  - c. Education
  - d. Foster care
  - e. Department of Human Services
  - f. Domestic Violence
  - g. Community corrections
  - h. Healthcare, both physical and mental
  - i. Substance use treatment
  - j. Peer support
12. Identify unmet needs, gaps in services and system barriers and address these with the system of providers.
13. Provide case staffing, either in a group of service provider peers or one-on-one, as needed.
14. Assist with program access prioritization, as needed.
15. Incorporate participant voice in SHS programming decisions.
16. Maintain effective working relationships with contracted providers.
17. Attend training and community/systems meetings.
18. Provide or assist with creation of necessary participant/program forms.
19. Support Contractor in identifying and re-matching households in that either need a lower or higher level of service than originally anticipated. Re-matching may happen within contracted provider programs or across contracted providers.
20. Coordinate with Contractor to participate in by-name-list case conferencing meetings.
21. Apply the process as outlined in the Benchmark section described above.

## **Reporting Requirements**

### **Contractor Reporting Responsibilities**

1. Adhere to all data reporting requirements stated in this Exhibit A – Scope of Work.
2. Work with HST to continually improve on performance targets.
3. Conduct post-program-exit follow-up assessments at 6- and 12-month post-exit.
  - a. Enter the results into HMIS.
4. Prepare an annual participant feedback report.
5. Submit to monitoring for contract compliance.

### **HST reporting responsibilities**

1. Work with Contractor to continuously monitor demographics and outcomes, and to create any necessary quality improvement plans.
2. Assist with achieving desired program outcomes and improving those outcomes.
3. Communicate with Contractor in a timely manner when additional data metrics are determined.
4. Use HMIS data to create and provide semi-annual “progress report” to Contractor.

5. Work with Contracted providers to continually improve on performance targets.
6. Work with Contractor to identify strengths and weaknesses apparent in programming through data.
7. Review and identify strengths and weaknesses from participant feedback report with Contractor.
8. Monitor for contract compliance.

In addition to the above, Contractor agrees to accomplish the above work under the following terms: Guiding Principles, further outlined in Exhibit B.

### **Housing Navigation & Placement Program Design**

Contractor shall provide a housing navigation and placement program. This program will assist households with moving into permanent housing within the Metro jurisdictional boundaries and provide a warm hand-off to a supportive housing case manager assigned to each household. Agencies with capacity can provide both navigation, placement, and supportive housing case management to ensure continuity of care.

This program will maintain a navigator to participant ratio of 1:10 at all times. The program will provide **2 FTE's with a revolving capacity to assist approximately 20 households at a time**. Contractor must report revolving capacity at least monthly to the HST Navigation Program Coordinator.

This program will provide connections with long-term supportive services and help navigate the housing placement process following a Housing First model. This program will work with the HST Navigation (NAV), Outreach and Engagement and Safety off the Streets (O&E/SoS) and Supportive Housing Case Management (SHCM) Program Coordinators to provide engagement, problem solving, matching, warm hand-offs to services, and re-location assistance and support as needed. Allowing for up to 120 days from housing navigation program entry to housing placement, with the goal that most households are served with navigation and placement within 90 days, Contractor will move not less than approximately **20** households into permanent housing every four months, or approximately **60** households per year. There is no limit; therefore, the program may serve more households with navigation services in a given year barring system capacity and availability of resources.

Housing navigation and placement consists of flexible services and funding to assist households in accessing and securing rental housing. Housing navigation and placement is tailored to meet each household's specific needs so they can move into rental housing as quickly as possible. Contractor will engage collaboratively with the HST, community groups, and other housing organizations to creatively support client needs related to housing.

Referrals for housing navigation will come primarily from the By-name-list through regular case conferencing and matching meetings. Referrals may also come directly from the Coordinated Housing Access (CHA) Domestic Violence door, street outreach or from emergency shelter programs, as assigned by Navigation (NAV), Outreach and Engagement

and Safety off the Streets (O&E/SoS) and Supportive Housing Case Management (SHCM) Program Coordinators.

Navigation case managers must maintain contact with 100% of participants, check in at least weekly, and document activities and needs related to housing clients. Multiple, progressive efforts will be made to engage each household in a housing search plan. If program staff are unable to make contact over the course of 30 consecutive days, report the delay to the Navigation Program Coordinator to assist with engagement strategies. If a household does not find permanent housing or chooses not to engage with housing navigation and placement services, this program will work with O&E/SoS Program Coordinator to engage in Housing First Aid, harm-reduction conversations.

**Housing navigation and placement must include the following:**

- Check-ins at least weekly with all participating households.
- Assessment of housing barriers needs and preferences.
- Support and flexible funds to address immediate housing barriers.
- Assistance attending housing orientations and responding to program requirements to secure long-term rent assistance.
- Housing search assistance, including researching available units, contacting landlords, accompanying participants on apartment tours, etc.
- Landlord engagement, establishing relationships with landlords to facilitate participant placement.
- Assistance with housing application preparation, housing application appeals and reasonable accommodation requests necessary to obtain housing.
- Support with moving assistance, securing furniture, application fees, and other non-rent move-in costs.

**Housing Navigation & Placement Program Goals and Benchmarks:**

<b>Outcome</b>	<b>Goal</b>	<b>Data Source</b>
Data Accuracy	95% data completeness in HMIS	HMIS
Housing Navigation	House at least 85% of households matched with the program within 120 days of receiving a housing subsidy; house at least 60% within 90 days.	HMIS
Capacity	Maintain 90% capacity at all times starting 90 days post-contract execution.	HMIS and Matching Report
System Efficiency	Utilize RLRA extensions for fewer than 20% of clients.	Yardi

**To maintain progress towards program success, Contractor must meet the following benchmarks:**

**Timeline:**

- Make all reasonable efforts to hire and have 100% of staff within 90 days of contract execution.
- Complete HMIS training for at least one staff member within 90 days of hiring
- All program staff to complete Housing First Aid/Diversion training within 180 days of contract execution
- Submit agency program manual and policies within 180 days of contract execution.
- Staff will complete RLRA training and attend an RLRA Orientation within 30 days of being hired.
- Staff will participate in Built for Zero case conferencing within 30 days of being hired.

The program must work toward meeting the goals, follow the timeline, and meet each benchmark above, as indicated.

**Unmet benchmarks and lack of progress toward meeting goals will result in the following progressive action:**

- First time missing a benchmark/not making progress on goals.
  - Monitoring meetings with HST to identify barriers and possible solutions.
- Second time missing a benchmark/not making progress on goals.
  - Another monitoring meeting which will result in a mutually agreed upon Performance Improvement Plan (PIP)
- Third time missing a benchmark/not making progress on goals.
  - Another monitoring meeting, including an evaluation of PIP, with all remedies, up to and including Contract termination, available.

HST will use HMIS and training enrollment data to verify benchmark achievement. Contractor is expected to notify HST through email within 14 days once staff are hired and if there are challenges in meeting any of the benchmarks above.

**HST Benchmark and Timeline Responsibilities:**

1. Incorporate and adhere to the guiding principles and expectations set forth below.
2. Adhere to all applicable Fair Housing laws.
3. Support Contractor in creating policy manual, including sharing examples among Contracted providers.
4. Provide semi-annual “data progress reports” pulled and analyzed from HMIS, including equity data.
5. Provide HMIS access, training, and support.
6. Provide connections to CHA and Housing First Aid/diversion training.
7. Coordinate, support, and/or facilitate provider meetings, including case conferencing meetings, as needed.
8. Provide information, access, and/or support for staff to attend Equity, Inclusion and continuing education training.

9. Connect all contracted programs with the overall system of services for people experiencing homelessness.
10. Support both formal and informal partnerships between provider organizations, including those newly formed.
11. Facilitate connections to broader systems of care, including but not limited to:
  - a. Housing
  - b. Workforce
  - c. Education
  - d. Foster care
  - e. Department of Human Services
  - f. Domestic Violence
  - g. Community corrections
  - h. Healthcare, both physical and mental
  - i. Substance use treatment.
  - j. Peer support
12. Identify unmet needs, gaps in services and system barriers and address these with the system of providers.
13. Provide case staffing, either in a group of service provider peers or one-on-one, as needed.
14. Assist with program access prioritization, as needed.
15. Incorporate participant voice in SHS programming decisions.
16. Maintain effective working relationships with contracted providers.
17. Attend training and community/systems meetings.
18. Provide or assist with creation of necessary participant/program forms.
19. Support Contractor in identifying and re-matching households that either need a lower or higher level of service than originally anticipated. Re-matching may happen within contracted provider programs or across contracted providers.
20. Coordinate with Contractor to participate in by-name-list case conferencing meetings.
21. Apply the process as outlined in the Benchmark section described above.

### **Reporting Requirements**

Contractor reporting responsibilities:

1. Adhere to all data reporting requirements stated in this Exhibit A – Scope of Work. Work with HST to continually improve on performance targets.
2. Conduct post-program-exit follow-up assessments at 6 and 12 months post-exit.
  - a. Enter the results into HMIS.
3. Prepare an annual participant feedback report.
4. Submit to monitoring for contract compliance.

HST reporting responsibilities:

1. Work with Contractor to continuously monitor demographics and outcomes, and to create any necessary quality improvement plans.
2. Assist with achieving desired program outcomes and improving those outcomes.
3. Communicate with Contractor in a timely manner when additional data metrics are determined.
4. Use HMIS data to create and provide semi-annual “progress report” to

- Contractor.
5. Work with Contracted providers to continually improve on performance targets.
  6. Work with Contractor to identify strengths and weaknesses apparent in programming through data.
  7. Review and identify strengths and weaknesses from participant feedback report with Contractor.
  8. Monitor for contract compliance.

### **Supportive Housing Case Management/Retention (“SHCM”) Program Design**

Contractor shall provide a supportive housing case management program. Supportive housing is affordable housing combined with ongoing services that are flexible, participant-driven, not time-limited, and voluntary to assist households who are experiencing homelessness in achieving housing stability and personal wellness. The program will assist households in maintaining permanent housing within the Metro jurisdictional area.

This program will work with the HST Navigation (NAV), Outreach and Engagement and Safety off the Streets (O&E/SoS) and Supportive Housing Case Management (SHCM) Program Coordinators to provide engagement, problem solving, matching, warm hand-offs to services, and re-location assistance and support as needed.

All referrals to SHCM will come from the by-name list and through Coordinated Housing Access (CHA) system, and/or the Domestic Violence by-name list (“DV by-name”) list and CHA DV system. Programs receive referrals through the matching process. When the program receives referrals, each new referral will be contacted via all known contact points. Those referrals coming from housing navigation services will receive a warm hand-off (see warm hand off guidance) into this SHCM program.

Subject to availability of funds, as determined by Clackamas County’s Housing Services Team (HST) in its sole administrative discretion, HCDD will pay the rental subsidy costs through the Regional Long-term Rental Assistance (RLRA) program. HST will provide coordination to support smooth transitions between housing navigation/placement and supportive housing case management.

At full staff and program capacity the program will assist no less than 125 households annually with supportive housing case management, with one additional FTE assisting 25 households at Fuller Road Station. The expected case manager to participant ratio is approximately 1:25. As more participants are added to that case load SHS would need to fund additional staff to accommodate them.

Case management services are dedicated to ensuring participants remain in permanent housing long-term either through ongoing housing subsidy and support or by “graduating” from rental subsidy and/or intensive case management. Program case managers and leadership will work with HST SHCM program coordinator on housing retention, capacity building and training needs.

Specific components of supportive housing case management include, but are not limited to:

- Intensive, relationship based, and trauma informed one-on-one case management focused on housing stabilization and lease compliance offered at least monthly (and in most cases, weekly).
- Highly flexible services tailored to meet the needs of each household must be offered; services must be offered based upon the individual's needs and desires.
- These services must include, but are not limited to:
  - Identify and leverage existing individual/family strengths, expertise, and assets through a strength-based assessment.
  - Create a housing stability action plan and housing goals for each household, including wraparound services, which are determined by participants and focused on housing success.
  - Evaluate progress, as defined by the participant, and adjust plan as needed.
  - Ensure each participant has a monthly plan to pay their portion of the rent/utilities; money management support.
  - Assistance responding to RLRA requirements including inspections and paperwork completion.
  - Act as a landlord contact and assist in landlord relationship development.
  - Education on tenant and landlord rights and responsibilities
  - Regular communication with the tenant and property management
  - Early intervention and support to address issues that could jeopardize housing stability.
  - Problem solving and crisis management.
  - Connection to independent living supports and/or provision of life skills training, as needed.
  - Support with connecting to all eligible mainstream benefits.
  - Connections to education and employment opportunities
  - Assistance, or connections to assistance, with applying for SSI/SSDI, using the SOAR model, and other benefits, when appropriate.
  - Appropriate use of flexible funding to support housing stability and wellness goals.
  - Assistance with house cleaning and unit maintenance as needed to ensure lease compliance.
  - Coordination and connections with other supportive services as needed.
  - Plan to “graduate” from housing subsidy and/or intensive housing case management services, as appropriate using moving on policy.



### Supportive Housing Case Management Benchmarks

Outcome	Goal	Data Source
Data Accuracy	95% data completeness in HMIS	HMIS
Optimal Occupancy	Once at full program capacity, maintain at least 95% occupancy, based on stated capacity.	HMIS

Increase or maintain Income	At least 80% of households will increase or maintain income through employment and/or benefit acquisition.	HMIS
Ending Homelessness	At least 95% of households, housed through the program, who subsequently must leave their rental unit are re-located to a new rental unit without a break in supportive services	HMIS, case notes
Ending Homelessness	At least 87% of households will either maintain housing within the program for at least 12 months or exit the program to a permanent housing destination	HMIS
Ending Homelessness	At least 95% of households who exit to permanent housing, remain in permanent housing as of 6 month follow-up assessment	HMIS

**Benchmarks and Timeline:**

1. Make all reasonable efforts to hire and have 100% of staff within 90 days of contract execution.
2. Complete HMIS training for at least one staff member within 90 days of contract execution
3. All program staff to complete Housing First Aid/Diversion training within 180 days of contract execution
4. Submit agency program manual and policies within 180 days of contract execution.
5. Staff complete RLRA training and attend an RLRA Orientation within 30 days of being hired.
6. Staff will participate in Built For Zero Case Conferencing within 30 days of being hired.

The program must work toward meeting the goals, follow the timeline, and meet each benchmark above, as indicated.

**Unmet benchmarks and lack of progress toward meeting goals will result in the following progressive action:**

- First time missing a benchmark/not making progress on goals.
  - Monitoring meetings with HST to identify barriers and possible solutions.
- Second time missing a benchmark/not making progress on goals.

- Another monitoring meeting which will result in a mutually agreed upon Performance Improvement Plan (PIP)
- Third time missing a benchmark/not making progress on goals.
  - Another monitoring meeting, including an evaluation of PIP, with all remedies, up to and including Contract termination, available.

HST will use HMIS and training enrollment data to verify benchmark achievement. Contractor is expected to notify HST through email within 14 days once staff are hired and if there are challenges in meeting any of the benchmarks above.

### **HST Benchmark and Timeline responsibilities**

1. Incorporate and adhere to the guiding principles and expectations set forth below.
2. Adhere to all applicable Fair Housing laws.
3. Support Contractor in creating policy manual, including sharing examples among Contracted providers.
4. Provide semi-annual “data progress reports” pulled and analyzed from HMIS, including equity data.
5. Provide HMIS access, training, and support.
6. Provide connections to CHA and Housing First Aid/diversion training.
7. Coordinate, support, and/or facilitate provider meetings, including case conferencing meetings, as needed.
8. Provide information, access, and/or support for staff to attend Equity, Inclusion and continuing education training.
9. Connect all contracted programs with the overall system of services for people experiencing homelessness.
10. Support both formal and informal partnerships between provider organizations, including those newly formed.
11. Facilitate connections to broader systems of care, including but not limited to:
  - a. Housing
  - b. Workforce
  - c. Education
  - d. Foster care
  - e. Department of Human Services
  - f. Domestic Violence
  - g. Community corrections
  - h. Healthcare, both physical and mental
  - i. Substance use treatment
  - j. Peer Support
12. Identify unmet needs, gaps in services and system barriers and address these with the system of providers.
13. Provide case staffing, either in a group of service provider peers or one-on-one, as needed.
14. Assist with program access prioritization, as needed.
15. Incorporate participant voice in SHS programming decisions.
16. Maintain effective working relationships with contracted providers.
17. Attend training and community/systems meetings.
18. Provide or assist with creation of necessary participant/program forms.

19. Support Contractor in identifying and re-matching households that either need a lower or higher level of service than originally anticipated. Re-matching may happen within contracted provider programs or across contracted providers.
20. Coordinate with Contractor to participate in by-name-list case conferencing meetings.
21. Apply the process as outlined in the Benchmark section described above.

### **Reporting Requirements**

#### Contractor Reporting Responsibilities:

1. Adhere to all data reporting requirements stated in this Exhibit A – Scope of Work. Work with HST to continually improve on performance targets.
5. Conduct post-program-exit follow-up assessments at 6 and 12 months post-exit.
  - a. Enter the results into HMIS.
6. Prepare an annual participant feedback report.
7. Submit to monitoring for contract compliance.

#### HST Reporting Responsibilities:

1. Work with Contractor to continuously monitor demographics and outcomes, and to create any necessary quality improvement plans.
2. Assist with achieving desired program outcomes and improving those outcomes.
3. Communicate with Contractor in a timely manner when additional data metrics are determined.
4. Use HMIS data to create and provide semi-annual “progress report” to Contractor.
5. Work with Contracted providers to continually improve on performance targets.
6. Work with Contractor to identify strengths and weaknesses apparent in programming through data.
7. Review and identify strengths and weaknesses from participant feedback report with Contractor.
8. Monitor for contract compliance.

### **Connections to Stable Housing Scope**

Contractor shall provide a housing navigation, placement, and rapid rehousing (RRH) program. This program includes navigation, placement, rental assistance, and supportive services to help households move from temporary housing or homelessness to permanent housing. Housing types may include private market rentals and affordable housing units. The goal of this project is to provide the lightest touch necessary to support households in achieving long term housing stability. Services should align with the Housing First model (Exhibit H - Definitions).

For Connections to Stable Housing funded by Executive Order 23-02 (“EO”), Contractor will assist households experiencing homelessness or living in temporary housing move into permanent housing solutions. This program is designed for those who have recently become homeless or are on the verge of becoming homeless and was awarded from HB 5019 for use from July 1, 2023, to January 10, 2024.

The EO makes available \$2,770,000 to fund rapid rehousing in Clackamas County and the State of Oregon has a goal of rehousing 130 households in the Clackamas County region.

Contractor is a part of the Continuum of Care (“CoC”) Clackamas County Region and shall receive and use the EO funds to provide rapid rehousing for the stated number of households within its own program and through contracts with subcontractors of rapid rehousing services. The County shall not hold the Contractor solely responsible to achieve the goal of rapidly rehousing 130 households, but shall identify and facilitate connection and communication with subcontractors of rapid-rehousing services. The County shall provide all necessary training and support for HMIS data entry to the identified subcontractor providers.

Rental assistance commitments, when utilized under rapid-rehousing services, may be issued for up to a 12-month period of time after client move in and may also be issued in the form of an upfront payment to the landlord. Rental assistance commitments may include pre-paid costs to encourage landlord participation. Costs may also include paying for damages or past due housing debt to secure new units or resources. Supportive housing services may be provided for block-leased units and for households that are rehoused pursuant to this Grant Agreement No. OR-507 to ensure participants are able to stay securely housed and landlords are supported with various needs.

Contractor will use funds to subsidize participants’ rental expenses, for the operational costs of administering a rapid-rehousing program, including personnel, occupancy, and rental subsidies, as well as to reimburse expenses subcontractors incurred related to rent payments to offer subsidy for Connections to Stable Housing.

Contractor and its subcontractors shall conduct an initial evaluation of clients in accordance with local CoC requirements applicable at the time of client evaluation. For the purposes of client eligibility, Contractor and its subcontractors must determine which category of housing status each household meets. Eligibility based on housing status shall be determined based upon the initial engagement with the client. For the purpose of EO funding, in this Contract, Category 6 is the only eligible category, as described under the Grant Agreement, Exhibit A – Grant Activities, Section 2. Grant Activities, Item E - Client Evaluation, Category 6 – **Unsheltered Homelessness**. Under Category 6, individuals or families that are living in a primary nighttime residence that is a public or private place not designed for human habitation (including, but not limited to, a car, park, abandoned building, bus or train station, airport or camping ground) are eligible for Rapid Re-housing.

When using Emergency Order funds, the above requirements must be met.

Contractor will continue to provide rapid rehousing program services funded by the Supportive Housing Services Measure funds and County General Funds. The requirements of this program are defined in the following paragraphs.

All referrals to housing navigation, placement, and rapid rehousing will come from the by-name list and/or through the Coordinated Housing Access (CHA) line. Housing First Aid/diversion must be meaningfully attempted with each household before providing prevention, re-location assistance, or homeless placement services. When the program receives referrals, each new

referral will be contacted via all known contact points within five (5) business days to assess current eligibility and interest in this program.

The program will assist **approximately 50 households annually** with rapid rehousing. Throughout the entirety of services, case managers will act as the landlord contact and assist in landlord relationship development. The expected case manager to participant ratio is approx. 1:15. As more participants are added to the case load, more staff must be added to accommodate them.

Because relocation and housing navigation assistance are core components of this type of program, flex funds will include necessary categories to support housing search and placement.

**Housing Navigation and Placement services** are tailored to meet each household's specific needs and must include, but are not limited to:

- Check-ins at least weekly with all participating households during housing search.
- Client-driven assessment of housing barriers, needs, and preferences.
- Support and flexible funds to address immediate housing barriers.
- Assistance attending housing orientations and responding to program requirements to secure long-term rent assistance in cases where longer-term subsidy is deemed necessary for housing stabilization.
- Housing search assistance, including researching available units, contacting landlords, accompanying participants on apartment tours, etc.
- Landlord engagement, establishing relationships with landlords to facilitate participant placement and retention.
- Assistance with housing application preparation, housing application appeals and reasonable accommodation requests necessary to obtain housing.
- Support with moving assistance, securing furniture, application fees, and other non-rent move-in costs.

After housing placement, rental subsidy and case management is provided to stabilize households. Participant portion of the rent will follow rapid rehousing rent assistance best practices to move the participant toward paying 100% of their rental costs as soon as possible. Rental subsidy will not necessarily be a percentage. Providers shall consider the income information for the last 30 days collected at intake to determine the percentage or amount each program participant must pay while receiving assistance. The determination will be documented in the client file. Each provider must create a RRH rent calculation policy and submit it to the Housing Services Team (HST) for approval.

Once housed, services are tailored to meet each household's specific needs and typically include a combination of one or more of the following:

- Regular check-ins with households (offered at least monthly, typically more frequently in the first months following placement)
- Mediation between the landlord and resident
- Short-term rent assistance and case management (up to 24 months)
- Flexible funding to support housing stability goals.

- Plan to increase income through education, employment, and/or benefits support.
- Plan to “graduate” from housing subsidy and intensive services
- Plan to transition households who have higher needs to long term rent assistance with or without supportive services.

In addition to the obligations set forth above, Contractor shall perform the following.

1. Incorporate and adhere to the guiding principles and expectations set forth in Exhibit B - Guiding Principles and Expectations
2. Develop internal program policies and procedures manual.

**Goals and Benchmarks**

Outcome	Goal	Data Source
Data Accuracy	95% data completeness in HMIS	HMIS
Optimal Occupancy	Once at full program capacity, maintain at least 87% occupancy, based on stated capacity.	HMIS
Ending Homelessness	At least 87% of households, housed through the program, who subsequently must leave their rental unit are re-located to a new rental unit without a break in supportive services	HMIS, case notes
Ending Homelessness	At least 87% of households will either maintain housing within the program for at least 12 months or exit the program to a permanent housing destination	HMIS
Ending Homelessness	At least 87% of households who exit to permanent housing, remain in permanent housing as of 6 month follow-up assessment	HMIS

**Benchmarks and Timeline:**

Contractor Benchmark and Timeline Responsibilities: \_

1. Make all reasonable efforts to hire and have 100% of staff within 90 days of contract execution.
2. Complete HMIS training for at least one staff member within 90 days of contract execution

3. Program staff to complete Housing First Aid/Diversion training within 180 days of contract execution
4. Submit agency program manual and policies within 180 days of contract execution.
5. Staff will participate in all applicable case conferencing meetings, as directed by HST staff, within 30 days of being hired.

The program must work toward meeting the goals, follow the timeline, and meet each benchmark above, as indicated.

**Unmet benchmarks and lack of progress toward meeting goals will result in the following progressive action:**

- First time missing a benchmark.
  - Monitoring meetings with HST to identify barriers and possible solutions.
- Second time missing a benchmark.
  - Another monitoring meeting which will result in a mutually agreed upon Performance Improvement Plan (PIP)
- Third time missing a benchmark.
  - Another monitoring meeting, including an evaluation of PIP, with all remedies, up to and including Contract termination, available.

HST will use HMIS and training enrollment data to verify benchmark achievement. Contractor is expected to notify HST through email within 14 days once staff are hired and if there are challenges in meeting any of the benchmarks above.

**HST Benchmark and Timeline Responsibilities**

1. Incorporate and adhere to the guiding principles and expectations set forth above.
2. Adhere to all applicable Fair Housing laws.
3. Support Contractor in creating policy manual, including sharing examples among Contracted providers.
4. Provide semi-annual “data progress reports” pulled and analyzed from HMIS, including equity data.
5. Provide HMIS access, training, and support.
6. Provide connections to CHA and Housing First Aid/diversion training.
7. Coordinate, support, and/or facilitate provider meetings, including case conferencing meetings, as needed.
8. Provide information, access, and/or support for staff to attend Equity, Inclusion and continuing education training.
9. Connect all contracted programs with the overall system of services for people experiencing homelessness.
10. Support both formal and informal partnerships between provider organizations, including those newly formed.
11. Facilitate connections to broader systems of care, including but not limited to:
  - a. Housing
  - b. Workforce
  - c. Education
  - d. Foster care
  - e. Department of Human Services



- f. Domestic Violence
  - g. Community corrections
  - h. Healthcare, both physical and mental
  - i. Substance use treatment
  - j. Peer support
12. Identify unmet needs, gaps in services and system barriers and address these with the system of providers.
  13. Provide case staffing, either in a group of service provider peers or one-on-one, as needed.
  14. Assist with program access prioritization, as needed.
  15. Incorporate participant voice in SHS programming decisions.
  16. Maintain effective working relationships with contracted providers.
  17. Attend training and community/systems meetings.
  18. Provide or assist with creation of necessary participant/program forms.
  19. Support Contractor in identifying and re-matching youth households that either need a lower or higher level of service than originally anticipated. Re-matching may happen within contracted provider programs or across contracted providers.
  20. Coordinate with Contractor to participate in by-name-list case conferencing meetings.
  21. Apply the process as outlined in the Benchmark section described above.

**Reporting Requirements**

Contractor Reporting Responsibilities:

1. Adhere to all data reporting requirements stated in this Exhibit A – Scope of Work and in Exhibit J – EO 23-02 – Process for System Administrators, as set up by the County.
2. Complete narrative sections of semi-annual “progress reports” within 30 days of receipt
3. Semi-annual “progress reports” will include, at a minimum, but not limited to the following data categories:
  - a. HMIS data quality: % missing.
  - b. Participant demographic data, including race and ethnicity.
    - i. All data points listed below will include a breakdown of demographic characteristics related to race and ethnicity.
  - c. Average cost per household served (successfully and total)
  - d. Program-specific elements
    - i. Number of youth households served.
    - ii. Bed/Unit utilization
    - iii. Rates of increased income and benefits
    - iv. Rates of RRH
      1. Maintenance of housing in program
      2. Exits to other RRH.
      3. Average length of program participation
      4. Rate of exit from RRH to permanent housing
    - v. Average cost per household served annually.
  - e. Narrative responses to questions that align with the Guiding Principles and Expectations

- i. What are some unexpected challenges you faced or strengths you have discovered as an agency? (Consider including participant success stories)
  - ii. How is your agency working towards ensuring low-barrier programming? Have you seen a need to adjust services to make them more accessible?
  - iii. Please explain how you have been leading with race while reducing homelessness overall in the community.
  - iv. Has your agency made progress toward “building connections and coordinating with multiple systems of care to build a community of resources, easily accessible to all”? If yes, please describe how the need for the new connection was identified and the process of building the connection.
4. Work with HST to continually improve on performance targets.
  5. Conduct post-program-exit follow-up assessments at 6 and 12 months post-exit.
    - a. Enter the results into HMIS.
  6. Prepare an annual participant feedback report.
  7. Submit to monitoring for contract compliance.

HST Reporting Responsibilities:

1. Work with Contractor to continuously monitor demographics and outcomes, and to create any necessary quality improvement plans.
2. Assist with achieving desired program outcomes and improving those outcomes.
3. Communicate with Contractor in a timely manner when additional data metrics are determined.
4. Use HMIS data to create and provide semi-annual “progress report” to Contractor.
5. Work with Contracted providers to continually improve on performance targets.
6. Work with Contractor to identify strengths and weaknesses apparent in programming through data.
7. Review and identify strengths and weaknesses from participant feedback report with Contractor.
8. Monitor for contract compliance.

**EXHIBIT C  
PERSONAL SERVICES CONTRACT  
BUDGET FY 23-24**

<b>Clackamas Women's Services - 10919 - FY 23-24</b>			
<b>Services</b>	<b>FY 22-23</b>	<b>FY 23-24</b>	<b>Total</b>
Safety off the Streets	\$ 694,178	\$ 1,003,461	\$ 1,697,639
Navigation	\$ 235,227	\$ 405,431	\$ 640,658
Supportive Housing Case Management	\$ 501,813	\$ 1,215,273	\$ 1,717,086
Rapid Rehousing	\$ 48,502	\$ 582,029	\$ 630,531
Shelter - General Fund	N/A	\$ 86,249	\$ 86,249
<b>Subtotal</b>	<b>\$ 1,479,720</b>	<b>\$ 3,292,443</b>	<b>\$ 4,772,163</b>
Rapid Rehousing - Emergency Order	N/A	\$ 2,770,000	\$ 2,770,000
<b>Total:</b>	<b>\$ 1,479,720</b>	<b>\$ 6,062,443</b>	<b><u>\$ 7,542,163</u></b>

**EXHIBIT G**  
**PERSONAL SERVICES CONTRACT**  
**USE OF SHS CLIENT SERVICES FLEXIBLE FUNDING**

Revised: 2/2023

Flexible Funding in the SHS program may be used to pay for supportive services or items that address specific needs of program participants. SHS flexible funding must only be used to assist program participants to obtain and maintain permanent housing. All SHS providers will follow procurement law and use reasonable discretion to make economical purchasing choices. **This list below includes guidelines and policies that should be used to inform program budgeting for use of client services flexible funding, recommended caps for specific expenditures, and some resources to seek first before using client services flexible funding.**

All uses of SHS client services flexible funding must fall within one of the following three categories:

- 1) Outreach – including safety on the streets/survival assistance (refer to your contract’s scope of work for further specific guidelines on outreach-related flexible funding use)
- 2) Obtaining permanent housing – including removal of barriers to obtaining permanent housing, acquiring necessary documents, filing and application fees, moving and furnishings, etc.
- 3) Maintaining permanent housing – including supportive services such as skills training, credit counseling, benefits acquisition, etc.; and eviction prevention costs, such as rent and utility arrears.

**All providers must maintain supportive documentation** that any use of client services flexible funding falls within these three categories. For expenses that fall outside the spending guidelines listed below, please document the justification for the variance in such expenses as they relate to the three eligible categories above; this may include notes in the client’s case file, supporting documentation from a medical provider, ledgers of unpaid debts to a housing provider, etc. Any questions on eligible use or supporting documentation can be directed to [HousingServices@clackamas.us](mailto:HousingServices@clackamas.us).

Housing Services staff will periodically monitor agency client services flex fund utilization to ensure that supportive documentation has been maintained. Failure to maintain supportive documentation will lead to progressive corrective action, which may include contract termination.

I. Rental Screening Barrier Busting

- Identification/documentation replacement-*up to \$200/person*
- Rent Arrears (up to \$5,000/household)- if needed to remove screening barrier and access rental housing
  - Be sure to consult COVID-related rental arrears legal guidance to determine if rental arrears accumulated during CY2020 and CY2021 may be used in

landlord screening. Housing Rights and Resources maintains up-to-date info on these and other protections:

<https://www.clackamas.us/socialservices/housingassistance.html>

- Utility arrears (*up to \$1000/household*)- if needed to remove screening barrier and access rental housing or to set up utilities in rental housing
  - Before making a payment, consult with Clackamas Energy Assistance Program: contacts at <https://www.clackamas.us/socialservices/energy.html>
- Traffic fines and fees up to *\$1000*
  - must be tied to removing screening barrier to rental housing-

## II. Housing Related Costs

- Rental Application fees-up to *\$150/household*
- Holding deposits-up to *\$400/household*
- Utility deposits-up to *\$500/household*
- Rental/Security deposits – work with RLRA team **first** to problem solve based on client specific needs to ensure compliance with the HACC Move Policy and in cases where the landlord will not accept a promissory note on a new move-in. If a participant needs to move due to health and/or safety and no other resources exist, flex funds can be used to pay for the security deposit. Check with HACC voucher program **first** to confirm if deposit assistance is available prior to using flex funds.
- Pet deposits- for up to 2 pets-up to *\$800*
- Utility payments—*up to \$500*
  - There is a utility allowance built into in the HACC rent calculation document *for heat, water, sewer, garbage and power to the rental unit*. Ensure the participant has an on-going plan to cover utility costs
- Unpaid tenant portion of rent: up to *\$500*
  - Must be a one-time or short-term prevention strategy
- Moving costs-up to *\$500 in total/household*
  - May include truck rental, moving company, and/or moving supplies
  - If hiring a moving company, agency must receive 3 quotes before contracting with lowest price
- Community Warehouse participation costs, including delivery fee-up to *\$500/household*
- Mattress (when unavailable at Community Warehouse) - up to *\$400*
  - For mattresses at a higher cost, please document need (such as medical need that could not be paid for with health insurance)
- Mediation between landlords and program participants-up to *\$300*
  - See also free landlord mediation services provided through the County’s Resolutions Services: <https://www.clackamas.us/ccrs/eviction-prevention-mediation>
- Temporary short-term housing provision- up to *\$150 per night*
  - Diversion should be used in all cases to find the most cost efficient, trauma-informed, and suitable option for each participant
  - If Emergency Shelter is the best intervention, attempts must be made first utilize

- existing Emergency Shelter units or vouchers
- Hotel/motel costs may be paid out of flex funding if all other options have been exhausted, including diversion, and this is the best option for the individual
  - Costs up to \$150 per night
  - **Must seek re-authorization at least monthly with Housing Services team to continue to pay for this cost**

### III. Other General Uses

- Basic Hygiene/medical needs-up to *\$100/person/year*
  - Ex. Menstruation products, toilet paper, first aid kit and/or supplies, toiletries etc.
- Survival assistance-up to \$500/household-
  - Includes costs to support program participants' ability to survive the elements while identifying temporary and/or permanent housing options.
  - Ex. Tent, sleeping bag, hand/foot warmers, socks, shoes, warm weather gear, food/water, sunscreen, backpack etc.
- Assistance applying for benefits-up to *\$500/applicant*
  - Ex. Fees to attorneys or others to assist with completing an SSI/SSDI application
- Cell phone bill-up to *\$200/household*
  - Before paying with SHS funds, households must apply for reduced cost phone programs. Example: Oregon Lifeline, <https://www.oregon.gov/puc/pages/oregon-lifeline.aspx>; Oregon Health Plan members can also receive a free phone via their care coordinator (with CareOregon or HealthShare). Info at: <https://www.healthplansinoregon.com/free-cell-phones-for-members-of-oregon-health-plan/>
- Educational/Life Skills services-up to *\$300*
  - Ex. Consumer/financial ed, health education, prevention programs, literacy, ESL/ELL, GED, tutoring, household management, conflict management, use of public transit, nutrition, meal prep, parental ed
  - Ex. buying required books, supplies, and/or instructional material associated with education
- Transportation
  - Bus passes (*monthly*)-*\$100/person*
    - If qualified, agency must assist individuals in applying for honored citizen or other reduced cost bus passes; apply via <https://trimet.org/fares/honoredcitizen.htm>
    - Check with local partners about TriMet partnerships to offset the cost of bus passes (example, Clackamas Service Center and The Father's Heart)
  - Gas cards (*up to \$100 monthly*)
    - When transportation is at least 70% associated with participants work, healthcare needs, grocery shopping, accessing services, and other essential functions

- SHS funding can only pay for gas cards on an as-needed bases. This policy should **not** be read to mean that every participant with a vehicle automatically receives \$100 a month
    - Car repair or maintenance, not to exceed 10% of Blue Book value of the vehicle-
- Food (*up to \$150/mo/household*)
  - Food paid for by SHS should be supplemental to SNAP benefits and accessing food banks and other free or reduced cost food programs
  - SHS funding can only pay for food on an as-needed bases. This policy should **not** be read to mean that every participant/household automatically receives \$150 a month in food assistance
- Employment assistance and job training- in-person or online- up to *\$100/working-age person*
  - Ex. Training in particular software or computer skills, on-the-job instruction, employment assistance programs, reasonable stipends for job training
- Costs or fees associated with participating in necessary healthcare services- up to *\$100*
  - *Contact Clackamas County Behavioral Health for appointments*
  - Ex. mental or physical health costs, program fees, etc.
- Credit Counseling- up to *\$75*
  - Assistance with resolving personal credit issues
- Engagement services- costs to support engagement with program participants-up to *\$150/household*
- Child Care
  - Cost of establishing childcare or providing childcare vouchers
  - Costs for food, as required by a childcare provider
- Storage unit costs- -up to *\$200/household*
  - *Storage unit costs should only be covered for a short time (generally 3 months max) until a participant can be reunited with their possessions*

**EXHIBIT I**  
**PERSONAL SERVICES AGREEMENT**  
**AGREEMENT NO. OR-507**  
**AND AMENDMENT #1**

Agreement No. OR-507

**Grant Agreement**

**State of Emergency Due to Homelessness**

This Agreement (this “Agreement”) is by and between the State of Oregon (“State”), acting by and through its Housing and Community Services Department (“Agency”), and Clackamas County (“Recipient”), each individually a “Party,” and collectively the “Parties.”

**1. Effective Date and Duration**

This Agreement shall become effective upon full execution by the Parties and, if required, approval by the Oregon Department of Justice, and shall expire on January 10, 2024, unless extended or terminated or sooner under the provisions identified within this Agreement. Expiration or termination of this Agreement will not prejudice Agency’s right to exercise remedies under this Agreement with respect to any breach that has occurred prior to expiration or termination.

**2. Background and Definitions**

The Parties acknowledge the following background related to this Agreement:

- a. On January 10, 2023, Governor Tina Kotek issued Executive Order 23-02 (the “EO”), which declared a state of emergency due to homelessness. The EO is necessary to rapidly expand the State’s low-barrier shelter capacity, to rehouse people experiencing unsheltered homelessness, and to prevent homelessness to the greatest extent possible. All executive state agencies are authorized, upon further direction from Governor Kotek and the Governor’s office, to take any actions authorized under the provisions set forth in ORS 401.168 through ORS 401.192. The EO took immediate effect and remains in effect until January 10, 2024, unless extended or terminated earlier by the Governor.
- b. During the 2023 Session of the Oregon Legislature, Agency was awarded funding from House Bill 5019, subject to passage and approval. Agency was appropriated funding for both the Biennium ending on June 30, 2023, and the Biennium beginning on July 1, 2023. Agency will grant funding from this bill through a variety of agreements to further the objectives of Executive Order 23-02, including by granting funds under this Agreement.
- c. All references to “days” in this Agreement shall mean calendar days.

**3. Consideration**

Agency agrees to pay Recipient, from available and authorized funds, the amount of actual expenses incurred by Recipient in performing the grant activities referenced below in Section 4 of this Agreement (“Authorized Expenses”), but not to exceed \$4,435,294.00 (the “Grant Funds”), as follows:

**3.1** On full execution of this Agreement by the Parties and, when required, approval by the Oregon Department of Justice, Agency will issue a Notice of Allocation (“NOA”) to Recipient, pursuant to which Recipient will submit a request for funds and Agency will make a lump-sum payment to Recipient in the amount of \$1,170,424.81 (the “Initial Payment”), which Recipient will



expend in accordance with the NOA. Recipient may use such funds to reimburse Authorized Expenses that were incurred by Recipient at any time during the period from January 10, 2023 to January 10, 2024 (the "Performance Period").

**3.2** After July 1, 2023, and following expenditure of the Initial Payment by Recipient and submission to Agency of a report detailing such expenditures in such form as is satisfactory to or required by Agency, Agency will reimburse Recipient for additional Authorized Expenses up to the amount of \$3,264,869.19 (the "Additional Allotment"), following receipt of requests by Recipient for such reimbursement. The total Grant Funds amount will equal the Initial Payment amount plus the Additional Allotment amount. Funds from the Additional Allotment will only be used to reimburse Authorized Expenses incurred from July 1, 2023 until the end of the Performance Period (January 10, 2024). Each such reimbursement request will be made following, and in accordance with, a NOA issued by Agency to Recipient, including, but not limited to any allocation of Grant Funds in the applicable NOA to specific expense categories. Recipient will submit requests for reimbursement under this Section 3.2 at least quarterly and in such form and manner as is satisfactory to or required by Agency. Agency and Recipient may, by mutual agreement, modify or terminate a NOA at any time. In the event of a conflict between any NOA and the terms of this Agreement, including, but not limited to the not-to-exceed amount set forth under this Agreement, the terms of this Agreement will prevail.

#### **4. Grant Activities**

Recipient will use Grant Funds to conduct the grant activities set forth in Exhibit A (the "Grant Activities"), which is attached to and incorporated into this Agreement. Recipient's receipt of Grant Funds is conditioned on Recipient's compliance with Exhibit A, including, but not limited to any performance measures set forth in Exhibit A.

#### **5. Authorized Representatives**

**5.1** Agency's Authorized Representative is:

Mike Savara  
725 Summer Street NE, Suite B  
Salem, OR 97301  
[Mike.Savara@hcs.oregon.gov](mailto:Mike.Savara@hcs.oregon.gov)

**5.2** Recipient's Authorized Representative is:

Raina Smith-Roller  
2051 Kaen Road  
Oregon City, OR 97045  
[rsmithroller@clackamas.us](mailto:rsmithroller@clackamas.us)

**5.3** A Party may designate a new Authorized Representative by written notice to the other Party.

## **6. Online Systems**

- 6.1** Recipient and its subrecipients must enter all appropriate and necessary data into OPUS (a web-based application developed by Agency), Homeless Management Information System (HMIS), Procorem or any other Agency-approved system designated by Agency (collectively, the "Sites") at the time of client intake, if applicable, or at such other times required by Agency. Exceptions are only allowed with prior written approval by Agency.
- 6.2** As a condition of use of the Sites, Recipient and its subrecipients (collectively, "User") agree to all terms and conditions contained in this Agreement, notices on the Sites, or other directives by Agency regarding use of the Sites. User agrees to not use the Sites for any unlawful purpose. Agency reserves the right, in its sole discretion, to update or revise the terms and conditions for use of the Sites.
- 6.3** Use of the Sites for additional reported "local" program data is at the Recipient's and subrecipients' own risk. Agency will not modify or otherwise create any screen, report, or tool in the Sites to meet needs related to this local data.
- 6.4** Recipient hereby grants and will require and cause any subrecipient to grant Agency the right to reproduce, use, display, adapt, modify, distribute, and promote the content on the Sites in any form and disclose, to the extent permitted by law, any or all of the information or data furnished to or received by Agency directly or indirectly resulting from this Agreement. Recipient also shall use and shall require and cause its subrecipients to use appropriate client release forms and privacy policy forms in connection with obtaining and transmitting client data.
- 6.5** Recipient understands and agrees, and shall require its subrecipients to agree, that all materials, information, software, products, and services included in or available through the Sites (the "Content") are provided "as is" and "as available" for use. The Content is provided without warranties of any kind, either express or implied, including, but not limited to, implied warranties of merchantability, fitness for a particular purpose, or non-infringement. Agency does not represent or warrant that: (1) the Content is accurate, reliable, or correct; (2) the Sites will be available at any particular time or location; (3) any defects or errors in the Content will be corrected; or (4) the Content is free of viruses or other harmful components. Use of the Sites is solely at the User's risk. User hereby accepts the risk of its use of the Sites, and of the use of the Sites by its subrecipients.
- 6.6** Recipient agrees that under no circumstances will Agency be liable for any direct, indirect, punitive, incidental, special, or consequential damages that result from the use of, or inability to use the Sites. This limitation applies whether the alleged liability is based on contract, tort, negligence, strict liability, or any other basis, even if Agency has been informed of the possibility of such damage.

## **7. Headings**

The headings or captions in this Agreement are for convenience only and in no way define, limit, or describe the intent of any provisions of this Agreement.

**8. Amendments**

The terms of this Agreement shall not be modified, supplemented, or amended in any manner whatsoever, except in writing by Agency.

**9. Nonexclusive Remedies Related to Funding**

Agency may withhold any and all undisbursed Grant Funds from Recipient if Agency, in its sole discretion, determines that Recipient has failed to timely satisfy any material obligation arising under this Agreement or otherwise. Recipient's material obligations include, but are not limited to, providing complete, accurate and timely reports satisfactory to Agency about Recipient's performance under this Agreement as well as timely satisfying all Agreement obligations relating to any Grant Funds.

If Grant Funds are not obligated for reimbursement by Recipient in a timely manner as determined by Agency in its sole discretion, Agency may reduce Recipient's funding as it determines to be appropriate in its sole discretion and redistribute such Grant Funds to other parties or retain such Grant Funds for other use. This remedy is in addition to any other remedies available to Agency under this Agreement or otherwise.

**10. Independent Contractor Relationship**

The Parties agree and acknowledge that their relationship is that of independent contracting parties and that neither Recipient, nor any of its directors, officers, employees or agents, is an officer, employee, or agent of the State of Oregon as those terms are used in ORS 30.265 or otherwise.

**11. Access to Records**

Recipient shall maintain all financial records relating to this Agreement in accordance with generally accepted accounting principles. In addition, Recipient shall maintain any other records, books, documents, papers, plans, records of shipments and payments and writings of Recipient, whether in paper, electronic or other form, that are pertinent to this Agreement in such a manner as to clearly document Recipient's performance. All financial records, other records, books, documents, papers, plans, records of shipments and payments and writings of Recipient, whether in paper, electronic or other form, that are pertinent to this Agreement, are collectively referred to as "Records." Recipient acknowledges and agrees that Agency and the Oregon Secretary of State's Office and their duly authorized representatives will have access to all Records to perform examinations and audits and make excerpts and transcripts. Recipient shall retain and keep accessible all Records for a minimum of six (6) years, or such longer period as may be required by applicable law, following termination of this Agreement, or until the conclusion of any audit, controversy or litigation arising out of or related to this Agreement, whichever date is later. Subject to the foregoing minimum records retention requirement, Recipient shall maintain Records in accordance with the records retention schedules set forth in OAR Chapter 166.

**12. Compliance with Law**

In connection with their activities under this Agreement, the Parties shall comply with all applicable law.

### **13. Contribution**

- 13.1** If any third party makes any claim or brings any action, suit or proceeding alleging a tort as now or hereafter defined in ORS 30.260 (a "Third Party Claim") against a Party (the "Notified Party") with respect to which the other Party (the "Other Party") may have liability, the Notified Party shall promptly notify the Other Party in writing of the Third Party Claim and deliver to the Other Party, along with the written notice, a copy of the claim, process and all legal pleadings with respect to the Third Party Claim that have been received by the Notified Party. Each Party is entitled to participate in the defense of a Third Party Claim, and to defend a Third Party Claim with counsel of its own choosing. Receipt by the Other Party of the notice and copies required in this Section and a meaningful opportunity for the Other Party to participate in the investigation, defense and settlement of the Third Party Claim with counsel of its own choosing are conditions precedent to the Other Party's contribution obligation under this Section 13 with respect to the Third Party Claim.
- 13.2** With respect to a Third Party Claim for which Agency is jointly liable with Recipient (or would be if joined in the Third Party Claim ), Agency shall contribute to the amount of expenses (including attorneys' fees), judgments, fines and amounts paid in settlement actually and reasonably incurred and paid or payable by Recipient in such proportion as is appropriate to reflect the relative fault of Agency on the one hand and of Recipient on the other hand in connection with the events that resulted in such expenses, judgments, fines or settlement amounts, as well as any other relevant equitable considerations. The relative fault of Agency on the one hand and of Recipient on the other hand shall be determined by reference to, among other things, the Parties' relative intent, knowledge, access to information and opportunity to correct or prevent the circumstances resulting in such expenses, judgments, fines, or settlement amounts. Agency's contribution amount in any instance is capped to the same extent it would have been capped under Oregon law if the State had sole liability in the proceeding.
- 13.3** With respect to a Third Party Claim for which Recipient is jointly liable with Agency (or would be if joined in the Third Party Claim), Recipient shall contribute to the amount of expenses (including attorneys' fees), judgments, fines and amounts paid in settlement actually and reasonably incurred and paid or payable by Agency in such proportion as is appropriate to reflect the relative fault of Recipient on the one hand and of Agency on the other hand in connection with the events that resulted in such expenses, judgments, fines, or settlement amounts, as well as any other relevant equitable considerations. The relative fault of Recipient on the one hand and of Agency on the other hand shall be determined by reference to, among other things, the Parties' relative intent, knowledge, access to information and opportunity to correct or prevent the circumstances resulting in such expenses, judgments, fines, or settlement amounts. Recipient's contribution amount in any instance is capped to the same extent it would have been capped under Oregon law if it had sole liability in the proceeding.

**13.4** Recipient shall take all reasonable steps to cause its contractor(s) that are not units of local government as defined in ORS 190.003, if any, to indemnify, defend, save and hold harmless the State of Oregon and its officers, employees and agents ("Indemnitor") from and against any and all claims, actions, liabilities, damages, losses, or expenses (including attorneys' fees) arising from a tort (as now or hereafter defined in ORS 30.260) caused, or alleged to be caused, in whole or in part, by the negligent or willful acts or omissions of Recipient's contractor or any of the officers, agents, employees or subcontractors of the contractor ("Claims"). It is the specific intention of the parties that the Indemnitor shall, in all instances, except for Claims arising solely from the negligent or willful acts or omissions of the Indemnitor, be indemnified by the contractor from and against any and all Claims. Any defense obligations to Indemnitor are subject to compliance with applicable provisions of ORS chapter 180.

#### **14. Recipient Default**

Recipient will be in default under this Agreement upon the occurrence of any of the following events:

**14.1** Recipient fails to perform, observe, or discharge any of its covenants, agreements, or obligations under this Agreement, including, but not limited to failure to perform Grant Activities or satisfy performance measures as set forth in Exhibit A and such failure is not remedied within thirty (30) days following notice from Agency to Recipient specifying such failure; or

**14.2** Any representation, warranty or statement made by Recipient in this Agreement or in any documents or reports submitted by Recipient in connection with this Agreement, concerning the expenditure of Grant Funds or Recipient's performance of any of its obligations under this Agreement, is untrue in any material respect when made; or

**14.3** Recipient fails to incur expenses, or to satisfy performance measures, at a rate or in a manner that would result in complete expenditure of the Grant Funds in accordance with this Agreement, or successful completion of all performance measures under this Agreement, on or before January 10, 2024, as determined by Agency in its sole discretion.

#### **15. Agency Default**

Agency will be in default under this Agreement if Agency fails to perform, observe, or discharge any of its covenants, agreements, or obligations under this Agreement.

#### **16. Remedies**

**16.1** In the event Recipient is in default under Section 14, Agency may, at its option, pursue any or all of the remedies available to it under this Agreement and at law or in equity, including, but not limited to: (a) termination of this Agreement under Section 18, (b) reducing, withholding or recovering payment of Grant Funds for activities that Recipient has failed to perform in accordance with this Agreement, (c) initiation of an action or proceeding for

damages, specific performance, or declaratory or injunctive relief, or (d) exercise of its right of recovery of overpayments under Section 17 of this Agreement or setoff, or both.

All of the above remedies in this Section 16.1 are cumulative to the extent the remedies are not inconsistent, and Agency may pursue any remedy or remedies singly, collectively, successively, or in any order whatsoever.

**16.2** Prior to any termination of this Agreement by Agency pursuant to Section 18.2.3, Agency will provide Recipient with a written notice of such default and will include in such notice an offer to meet with the senior manager of Recipient who has primary responsibility for oversight of the Grant Activities to provide Recipient an opportunity to explain the reasons for the default and to present a proposal for curing the default within a time period that is acceptable to Agency. Recipient shall have 5 days to accept such offer. If Recipient does not accept such offer within such 5-day period, Agency may terminate this Agreement upon 10 days' written notice as provided in Section 18.2.3 or exercise any other remedies available to Agency under this Agreement unless Recipient has fully cured such default prior to the expiration of such 10-day notice period. If Recipient accepts such offer, the meeting must be held within 14 days of such acceptance or at such other time as agreed by Agency. Following the meeting, Agency shall make a determination, in its reasonable discretion, of whether to accept Recipient's proposal, with such modifications as are mutually acceptable to the Parties, and shall give written notice of such determination to Recipient. If Agency's written notice states that Agency does not agree to such proposal, or if Agency accepts such proposal but Recipient does not satisfy the terms of the proposal, Agency may terminate this Agreement upon 10 days written notice as provided in Section 18.2.3 or exercise any other remedies available to Agency under this Agreement unless Recipient has fully cured such default prior to the expiration of such 10-day notice period.

**16.3** In the event Agency is in default under Section 15 and whether or not Recipient elects to exercise its right to terminate this Agreement under Section 18, or in the event Agency terminates this Agreement under Sections 18.2.1, 18.2.2, or 18.2.4, Recipient's sole remedy will be a claim for reimbursement of expenses incurred in accordance with this Agreement, less any claims Agency has against Recipient. In no event will Agency be liable to Recipient for any expenses related to termination of this Agreement or for anticipated profits or loss. If previous amounts paid to Recipient exceed the amount due to Recipient under this Section 16.2, Recipient shall promptly pay any excess to Agency.

## **17. Recovery of Overpayments; Withholding of Funds**

**17.1** If payments to Recipient under this Agreement, or any other agreement between Agency and Recipient, exceed the amount to which Recipient is entitled, Agency may, after notifying Recipient in writing, withhold from payments due Recipient under this Agreement, such amounts, over such periods of times, as are necessary to recover the amount of the overpayment.

**17.2** Agency may withhold any and all undisbursed Grant Funds from Recipient if Agency determines, in its sole discretion, that Recipient has failed to timely satisfy any material obligation arising under this Agreement, including, but not limited to providing complete, accurate, and timely reports in a form satisfactory to Agency, or if Agency determines that the rate or scale of requests for Grant Funds in any expenditure category materially deviates from an applicable NOA or is unsubstantiated by related documentation.

## **18. Termination**

**18.1** This Agreement may be terminated at any time by mutual written consent of the Parties.

**18.2** Agency may terminate this Agreement as follows:

**18.2.1** Immediately upon written notice to Recipient, if Agency fails to receive funding, appropriations, limitations, or other expenditure authority at levels sufficient, in Agency's reasonable administrative discretion, to perform its obligations under this Agreement;

**18.2.2** Immediately upon written notice to Recipient, if federal or state laws, rules, regulations, or guidelines are modified or interpreted in such a way that Agency's performance under this Agreement is prohibited or Agency is prohibited from paying for such performance from the planned funding source;

**18.2.3** If Recipient is in default under this Agreement and such default remains uncured for a period of 10 days following completion of the process outlined in Section 16.2; or

**18.2.4** As otherwise expressly provided in this Agreement.

**18.3** Recipient may terminate this Agreement immediately upon written notice to Agency, if Agency is in default under this Agreement and such default remains uncured 15 days after written notice to Agency.

**18.4** Upon receiving a notice of termination of this Agreement, Recipient will immediately cease all activities under this Agreement, unless Agency expressly directs otherwise in such notice.

## **19. Insurance**

**19.1** Recipient shall insure, or self-insure, and be independently responsible for the risk of its own liability for claims within the scope of the Oregon Tort Claims Act (ORS 30.260 through 30.300).

**19.2** Recipient shall require its first-tier contractor(s) that are not units of local government as defined in ORS 190.003, if any, to obtain the insurance specified in Exhibit C.

## **20. Availability of Funds**

Agency's obligation to pay any amounts and otherwise perform its duties under this Agreement is conditioned upon Agency receiving funding, appropriations, limitations, allotments, or other expenditure authority sufficient to allow Agency, in the exercise of its reasonable administrative discretion, to meet its obligations under this Agreement. Nothing in this Agreement may be construed as permitting any violation of Article XI, section 7 of the Oregon Constitution or any other law limiting the activities, liabilities, or monetary obligations of Agency.

## **21. Governing Law**

This Agreement shall be governed by and construed and enforced in accordance with the laws of the State of Oregon, without regard to principles of conflicts of law. Any claim, action, suit or proceeding (collectively "claim") between Recipient and Agency or the State of Oregon that arises from or relates to this Agreement shall be brought and conducted solely and exclusively within the Circuit Court of Marion County for the State of Oregon, provided that in the event that a claim must be brought in a federal forum, the claim shall be brought and conducted solely and exclusively within the United States District Court for the District of Oregon. Recipient consents to the exclusive jurisdiction of such courts. Nothing in this Agreement constitutes consent by the State of Oregon to the jurisdiction of any court or a waiver by the State of Oregon of any defense or immunity, including, but not limited to sovereign immunity and immunity under the Eleventh Amendment to the United States Constitution.

## **22. Notice**

Except as otherwise expressly provided in this Agreement, any notices to be given relating to this Agreement must be given in writing by email, personal delivery, or postage prepaid certified or registered mail, with return receipt, to a Party's Authorized Representative at the physical address or email address set forth in Section 5 of this Agreement, or to such other addresses as either Party may indicate pursuant to this Section 22. Any notice so addressed and mailed becomes effective five days after mailing. Any notice given by personal delivery becomes effective when actually delivered. Any notice given by email becomes effective upon the sender's receipt of confirmation of delivery, either by return email or by demonstrating through other technological means that the email has been delivered to the Recipient's email address.

## **23. Survival**

All rights and obligations of the Parties under this Agreement will cease upon termination of this Agreement, other than those rights and obligations that by their express terms survive termination of this Agreement or would reasonably be expected to survive termination of this Agreement; provided, however, that termination of this Agreement will not prejudice any rights or obligations accrued to the Parties under this Agreement prior to termination.

## **24. Intended Beneficiaries**

Agency and Recipient are the only parties to this Agreement and are the only parties entitled to enforce its terms. Nothing in this Agreement provides, is intended to provide, or may be construed to provide any direct or indirect benefit or right to third persons unless such third persons are individually identified by name herein and expressly described as intended beneficiaries of this Agreement.



**25. Assignment**

Recipient may not assign or transfer its interest in this Agreement without the prior written consent of Agency and any attempt by Recipient to assign or transfer its interest in this Agreement without such consent will be void and of no force or effect. Agency's consent to Recipient's assignment or transfer of its interest in this Agreement will not relieve Recipient of any of its duties or obligations under this Agreement. The provisions of this Agreement will be binding upon and inure to the benefit of the Parties hereto, and their respective successors and permitted assigns.

**26. Subcontracts**

Recipient shall notify Agency prior to entering into any subcontracts for any of the activities required of Recipient under this Agreement. Agency's receipt of notice of any subcontract will not relieve Recipient of any of its duties or obligations under this Agreement. For purposes of this Agreement, including, but not limited to any exhibits incorporated into this Agreement, "subcontract" means any agreement pursuant to which Recipient compensates another party to carry out any activities under this Agreement, whether by contract for goods or services, grant agreement, or otherwise. For avoidance of doubt, the term "subcontractor" includes any subgrantee or subrecipient to which Recipient awards any funds received by Recipient under this Agreement.

**27. Merger; Waiver**

This Agreement and all exhibits and attachments, if any, constitute the entire agreement between the Parties on the subject matter hereof. There are no understandings, agreements, or representations, oral or written, not specified herein regarding this Agreement. No waiver or consent under this Agreement binds either Party unless in writing and signed by the applicable Party. Such waiver or consent, if made, is effective only in the specific instance and for the specific purpose given.

**28. Counterparts**

This Agreement may be executed in several counterparts, all of which when taken together shall constitute one agreement, notwithstanding that all Parties are not signatories to the same counterpart. Each copy of the Agreement so executed constitutes an original.

[The remainder of this page intentionally left blank.]

**29. Signatures**

**Oregon Housing and Community Services  
Department**

DocuSigned by:  
*Sandra Flickinger*  
4641B29D2A0B49F...

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

Sandra Flickinger, Desig Proc Officer

\_\_\_\_\_  
**Printed Name & Title**

5/5/2023

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

**Clackamas County**

*Tootie Smith*  
\_\_\_\_\_

**Signature**

Tootie Smith, Chair, Board of County Commissioners

\_\_\_\_\_  
**Printed Name & Title**

05/04/2023

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

## Exhibit A

### Grant Activities

#### 1. Description

On January 10, 2023, Governor Tina Kotek declared a homelessness state of emergency in response to the 80% rise in unsheltered homelessness in emergency areas since 2017. The Governor directed state agencies to prioritize efforts to reduce homelessness and established a statewide housing production advisory council. In addition to these efforts on the part of the state government, Agency will play a major role in the delivery of the Governor’s early investment package that was awarded through House Bill (HB) 5019 during the 2023 Session of the Oregon Legislature. Most of these resources will be delivered to local emergency response regional planning bodies, including Continuums of Care (“CoC”) within the areas that are included within the emergency declaration as determined by Agency. Agency will support communities in deploying these funds, including but not limited to support pursuant to this Agreement, in a coordinated effort to accomplish the following statewide objectives:

1. Prevent homelessness for 8,750 households statewide;
2. Increase shelter capacity, quality, and utilization in emergency areas by 600 beds; and
3. Rehouse at least 1,200 households experiencing unsheltered homelessness in emergency areas.

Agency is deploying Grant Funds pursuant to a Homelessness Emergency Response Program designed to accomplish objective 3 identified above (the “Program”). Objectives 1 and 2 identified above will be accomplished through other agreements.

#### 2. Grant Activities

- A. Regional Unsheltered Homelessness Emergency Response Plan .** Prior to eligibility for funding, Recipient submitted a Regional Unsheltered Homelessness Emergency Response Plan (“Plan”) to Agency that specifies, among other things: current local, state, federal, and other resources allocated to rehousing services, and housing stabilization services; and current service levels and gaps in services and resources in emergency response areas specifically impacting people experiencing unsheltered homelessness. The Plan is attached to and incorporated into this Agreement as Exhibit B and, together with this Exhibit A, defines the scope of grant activities (“Grant Activities”) authorized for the purposes of this Agreement.
- B. Compliance with Agreement.** Recipient shall and shall cause and require by written agreement that its subcontractors comply with and perform all Grant Activities in accordance with the terms of this Agreement, including but not limited to all exhibits to this Agreement. The provisions of this Section 2 are supplemental to and do not limit the obligations of Recipient or its subcontractors arising under any other provision of this Agreement.

- C. Housing Focused.** All activities conducted under this Agreement must be Housing Focused. “Housing Focused” activities are defined as activities that seek to lower barriers for people experiencing homelessness or housing instability. Activities conducted under this Agreement may not screen participants out solely on the basis of certain behavioral, psychological, physiological, citizenship or immigration status or economic preconditions. Housing Focused services must ensure that the safety and support of both staff and clients are paramount. This is accomplished through a focus on ensuring safety by managing behaviors that pose a risk to health and safety rather than implementing blanket exclusions based on a past diagnosis or current behavioral health symptoms that do not pose a direct risk to community safety. Furthermore, Recipient must actively coordinate services and supports for helping people exit homelessness and make efforts to reduce the barriers to re-housing individuals and families in their community.
- D. No Supplanting of Other Funds.** Recipient may not use funds under this Agreement to supplant other funds available for the same purpose. Furthermore, Recipient agrees that during the term of this Agreement, the funding available for homeless services from sources other than this Agreement will not be reduced from the levels outlined in the Plan, and that in the event of any such reduction, Agency may exercise any of the remedies available to it under this Agreement or at law or in equity. Recipient also agrees to comply with reporting requirements as outlined in Section 3 of this Exhibit A (Program Specific Reporting) to demonstrate the levels of funding from other sources as outlined in the Plan are sustained throughout the term of this Agreement and that no reductions to such funding are made. Failure by Recipient to comply with this Section 2(D) is a material breach of this Agreement, and entitles Agency to exercise any remedies available to it under this Agreement or at law or in equity.
- E. Client Evaluation.** Recipient shall conduct an initial evaluation of clients in accordance with local CoC requirements applicable at the time of client evaluation. For the purposes of client eligibility, Recipient must determine which category of housing status each household meets. Eligibility based on housing status shall be determined based upon the initial engagement with the client.

The eligibility categories are as follows:

**Category 1: Literally Homeless**—Individual or family that lacks a fixed, regular, and adequate nighttime residence, meaning:

- Living in a primary nighttime residence that is a public or private place not designed for human habitation (including, but not limited to, a car, park, abandoned building, bus or train station, airport or camping ground);
- Living in a publicly or privately operated shelter designated to provide temporary living arrangements (including congregate shelters, transitional shelter, and hotels or motels paid for by charitable organizations or by federal, state or local government programs); or

- Exiting an institution where the individual or family has resided for 90 days or less AND who resided in an emergency shelter or place not meant for human habitation immediately before entering that institution.

**Category 2: Imminent Risk of Homelessness**—Individual or family that will lose their primary nighttime residence provided that:

- The primary nighttime residence will be lost within 14 days of the date of application for homeless assistance;
- No subsequent residence has been identified; AND
- The individual or family lacks the resources or support networks (e.g., family, friends, faith-based or other social networks) needed to obtain other permanent housing.

**Category 3: Homeless Under Other Federal Statutes**—Unaccompanied youth under 25 years of age, or families with children and youth, who do not otherwise qualify as homeless under another category, (literally homeless, imminent risk of homelessness or fleeing/attempting to flee domestic violence) but who:

- Are defined as homeless under other listed federal statutes;
- Have not had a lease, ownership interest, or occupancy agreement in permanent housing during the 60 days prior to the Program assistance eligibility determination;
- Have experienced persistent instability as measured by two moves or more during the preceding 60 days; AND
- Can be expected to continue in such status for an extended period of time due to special needs or barriers.

**Category 4: Fleeing/Attempting to Flee Domestic Violence**—Individual or family that:

- Is fleeing, or is attempting to flee, domestic violence;
- Has no other safe residence; AND
- Lacks the resources or support networks to obtain other permanent housing.

**Category 5: Unstably Housed**—Individual or family that:

- Is at risk of losing their housing, and does not otherwise qualify as homeless under Categories 1-4 listed above, provided that:
- Has been notified to vacate current residence or otherwise demonstrate high risk of losing current housing; AND

- Lack the resources or support networks to obtain other permanent housing.

**Category 6: Unsheltered Homelessness** – Individual or family that is living in a primary nighttime residence that is a public or private place not designed for human habitation (including, but not limited to, a car, park, abandoned building, bus or train station, airport or camping ground).

Client eligibility criteria for each of the above categories are as follows:

- Rapid Re-housing Client Eligibility Criteria:
  - Household must meet the following Housing Status Criteria at time of initial engagement:
    - **Category 6: Unsheltered Homelessness**
- Street Outreach Client Eligibility Criteria:
  - Household must meet the following Housing Status Criteria:
    - **Category 1: Literally Homeless**
    - **Category 2: Imminent Risk of Homelessness**
    - **Category 3: Homeless Under Other Federal Statutes**
    - **Category 4: Fleeing/Attempting to Flee Domestic Violence**
    - **Category 6: Unsheltered Homelessness**
- Grant Funds under this Agreement are not allowed to be used for households meeting Category 5, Unstably Housed. Prevention funding will be deployed to local communities through other agreements.

**F. Use of Grant Funds.** Consistent with the Plan as well as any applicable NOA, Grant Funds may be utilized for the following purposes:

- A. Street outreach services, including housing navigation and placement services
- B. Sanitation services
- C. Rapid-rehousing services, including landlord incentives to secure available units, through block-leasing strategies or other means, for people exiting homelessness. Rental assistance commitments, when utilized under rapid-rehousing services, may

be issued for up to a 12-month period of time after client move in and may also be issued in the form of an upfront payment to the landlord. Rental assistance commitments may include pre-paid costs to encourage landlord participation. Costs may also include paying for damages or past due housing debt to secure new units or resources. Supportive housing services may be provided for block-leased units and for households that are rehoused pursuant to this Agreement to ensure participants are able to stay securely housed and landlords are supported with various needs.

For all clients who are re-housed utilizing Grant Funds, Recipient is required to provide landlord with documentation showing that the landlord participated in the Program to ensure Agency can provide further guarantees of financial assistance through the Landlord Guarantee Program. Agency shall provide templates that Recipient may use for this purpose.

D. Administrative costs up to the limit outlined in the Plan (Exhibit B) including, but not limited to:

1. Senior executive management personnel salaries and benefits (unless they are directly involved in Program operations), administrative staff travel costs;
11. General services such as accounting, budget development, personnel, contracting, marketing, agency audit, agency insurance;
111. Board expenses (excluding meals);
- 1v. Planning and implementation of MAC group infrastructure
- v. Organization-wide membership fees and dues specific to the Program;
- v1. General agency facilities costs (including those associated with executive positions), such as rent, depreciation expenses, and operation and maintenance (as part of the organization's direct or indirect cost allocation plan); and
- v11. Equipment rental/purchase, insurance, utilities, and IT costs that are not specific to the Program but relate to the administration of the Recipient as a whole.

Recipient may also utilize Grant Funds to address the specific needs of various homeless subpopulations as set forth in the Plan. Targeting of funds must not violate the Fair Housing Act or other applicable anti-discrimination requirements.

### **3. Program Specific Reporting**

Recipient shall and shall cause and require its subcontractors by written agreement to submit to Agency all reports as required in this Agreement. Recipient shall and shall cause and require its subcontractors by written agreement to ensure that data collection and reporting, which may include personally identifiable information, be conducted through the use of Agency-approved systems including HMIS or HMIS-Comparable systems for Victim Service Providers. Recipient shall utilize existing systems of Agency (OPUS for fiscal management, and HMIS for Program outcome management, Procorem for reporting submission) for all funding under this Agreement in accordance with applicable policies and procedures of Agency. Recipient shall provide service provider technical assistance to users in Recipient's region and may request additional assistance from Agency as needed.

Recipient may request a reporting deadline extension. An extension must be approved, in writing by Agency in Agency's sole discretion. Requests must be emailed to [HCS.REPORTING@hcs.oregon.gov](mailto:HCS.REPORTING@hcs.oregon.gov) prior to the submission deadline.

The following reports and other documents shall be submitted to Agency throughout the Performance Period and for any additional period as required to include all reportable activities performed during, the Performance Period and all other reportable information relating to the Performance Period:

- (1) Monthly disaggregated data using the SAP Business Objects (the HMIS reporting tool) System Query Report. Report is due 20 days following the end of each month and uploaded into Procorem. The System Query data may be submitted by the HMIS administrator for all OHCS funded HMIS Participating Agencies/Providers in the HMIS instance.
- (2) Quarterly Aggregated Activity Reports using the SAP Business Objects OHCS Quarterly Report are due 20 days following the end of each quarter. Reports must be emailed to [HCS.REPORTING@HCS.oregon.gov](mailto:HCS.REPORTING@HCS.oregon.gov). The Quarterly Aggregated Activity Report may be submitted by the HMIS administrator for all OHCS funded HMIS Participating Agencies/Providers in the HMIS instance.
- (3) Biannual System Performance Measure Reports (SPMs) for the CoC and for All-in funded projects (Reporting Group) are due 20 days following the end of each month. These are "canned" reports found in WellSky Community Services (ServicePoint) Report Module: System Performance Measures. Instructions on how to format and share these reports will be provided by Agency. Reports must be emailed to [HCS.REPORTING@HCS.oregon.gov](mailto:HCS.REPORTING@HCS.oregon.gov).
- (4) Requests for funds through the OPUS system must be submitted within 60 days of the end of each quarter. A final request for funds must be submitted for all fiscal year expenses within 60 days of each fiscal year end. Backup documentation for expenditures made from the Initial Payment must be submitted to Agency within 30 days of June 30, 2023. Backup documentation for expenditures made from the Additional Allotment must be submitted through Agency's OPUS system.
- (5) Recipient shall provide additional reports and shall cooperatively attend meetings with Agency, as reasonably requested by Agency.



#### **4. Performance Measures**

Recipient shall and shall cause and require its subcontractors by written agreement to conduct the Grant Activities in a manner consistent with the requirements of this Agreement and to achieve the following performance goals, as well as the performance goals that are outlined in the Plan:

- A. Increased housing stability as measured by the number of individuals who were successfully re-housed and who met eligibility criteria as outlined in this Agreement before the end of the performance period (January 10, 2024) unless otherwise stated.

**Exhibit B**  
**Regional Plan**

# Oregon's ALL IN: Regional Planning Template and Funding Request

OR-507 (Clackamas County CoC)

## Contents:

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- [Overview](#)
- [Process](#)
- [Data Collection](#)
- [Community Analysis](#)
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## Overview

The purpose of Oregon's **All In initiative** is to increase state investments and strengthen the connection between state and local priorities in response to Oregon's long-growing unsheltered homelessness crisis. On January 10, 2023, Governor Tina Kotek declared a state of emergency in response to a 63% rise in homelessness since 2016. Oregon's Departments of Emergency Management (OEM) and Housing and Community Services (OHCS) have partnered to lead this work with the Office of the Governor.

The initial priority in this crisis is to target funding in a coordinated, three-prong effort to 1) **prevent homelessness** for at least 8,750 households statewide, 2) **increase shelter capacity** in emergency areas by 600 units, and 3) **rehouse** at least 1,200 **households** statewide this year.

The Oregon Housing and Community Services Department will deliver \$130,000,000 in funding to seven of Oregon's Continuums of Care (CoCs) deemed emergency areas. OEM and OHCS will lead this work and coordinate state agency support for local implementation. Over the course of the year, state partners will support regional and community partners in the emergency areas to:

- - Phase 1:** January–February
    - Determine additional state funding opportunities for unsheltered homeless services
    - Establish and begin managing MAC (multi-agency coordination) teams
  - Phase 2:** February–March
    - Determine regional impact and needs
    - Gather community priorities
    - Project this year's progress and possibility
    - Set goals and milestones
    - Confirm draft regional plan
  - Phase 3:** March–April
    - Determine local capacity for approved plan
    - Identify outstanding support and resource needs
    - Develop local implementation plans
  - Phase 4:** April–December
    - Monitor systems improvement
  - Phase 5:** August–December
    - Iterate on regional plan and strategies
    - Support continuous quality improvement
    - Document lessons learned
    - Determine regional impact for 2023 and 2024 needs
    - Celebrate and build on successes for 2024 planning

This **Regional Planning Template and Funding Request** is the framework for Phase 2 and is designed to support regional planning and streamline the state's funding process for homeless services under EO-23-02.

## Process

In February 2023, OHCS and OEM will convene regional and local leaders to provide an overview of Phase 2: Regional Planning and Funding Requests. This document covers the three steps of Phase 2:

- 1) Data Collection
- 2) Community Analysis
- 3) Goal Setting

This document can be used as a guide throughout Phase 2 and as a repository for qualitative data and community decisions and plans. State partners have attached an editable spreadsheet to this document, which will serve to collect data and automate calculations and projections necessary to the planning and funding process. Phase 2 is outlined below with items captured in the spreadsheet noted with an \*.

### Data Collection

- Partners\*
- Population\*
- Services\*

### Community Analysis

- Stakeholder Engagement
- Data Review
- Impact Analysis
- Community Priorities
- Unmet Needs

### Goal Setting

- Priority Strategies
- Projections\*
- Confirm Goals
- Milestones

*Partners*

*Services*

All In is focused on three core components of our statewide response to unsheltered homelessness: rehousing people experiencing unsheltered homelessness, preventing unsheltered homelessness, and shelter.

MAC teams will gather and input data\* to capture the relevant types of services, units, availability, and costs across the region. This will include all federal, state, local, and philanthropic contributions and funding for shelter, rehousing, and targeted homelessness prevention.

As communities identify priority strategies for each of these three areas, partners will refer to this data to identify capacity restraints and opportunities to invest in additional capacity. State agencies will also use this data to better understand and support communities in navigating unstable funding streams during and preceding the COVID-19 pandemic.

## **Community Analysis**

### *Part 1: Community Engagement and Data Review*

- 1) Please summarize your community engagement processes and the efforts made to ensure that the perspectives of people experiencing homelessness, frontline service providers, and groups at a high risk of experiencing homelessness inform regional priorities throughout Phase 2. Please list decision making processes and track community engagement efforts here as well.

From August, 2020 to April, 2021, Clackamas County conducted extensive and inclusive community engagement to inform the development of a Local Implementation Plan (LIP), as required by the passage of Metro ballot measure 26-210, the Supportive Housing Services (SHS) Measure. This engagement sought to elicit stakeholder perspectives on gaps in the current homelessness response system of care; investment priorities for the first years of implementation of the SHS Measure; and gaps and priorities for communities of color. Over a



dozen community advisory groups and stakeholder tables were engaged. Additionally, public listening sessions were held, consultants conducted focus groups and listening sessions with communities of color, and a diverse and inclusive LIP Steering Committee was established. By charter, the LIP Steering Committee membership was not less than half representatives from communities of color, and with a priority for lived experience, nearly half of the at-large membership had lived experience of homelessness and/or extreme poverty. The resulting LIP<sup>1</sup> was approved by the Housing Authority Board of Commissioners in April 2021 and subsequently approved by Metro. The LIP guides the County's work in prioritizing the use of funds for the delivery of housing and homeless services, and a regional Oversight Committee maintains the County's accountability for the implementation of the plans strategies and achieving the LIP's goals. The County annually updates the LIP goals with an Annual Work Plan, establishing outcome goals for housing placements, shelter unit development/support, eviction prevention, and other goals related to the County's LIP.

The County also staffs additional year-round engagement and decision making activities in multiple arenas. The Housing Services (formerly CoC) Steering Committee, with representation of people with lived experience, serves as the County's CoC governing body, as well as the local advisory body for the overall delivery of housing services, including those funded by the SHS Measure. A larger table, the Housing Services (formerly CoC) Community Group, consists of service providers and other system partners and provides input on challenges and needs in the community. Both meet monthly. Staff also engage with the

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<sup>1</sup> Clackamas County SHS Local Implementation Plan: <https://dochub.clackamas.us/documents/drupal/72f5e8e7-d1b9-4fc5-bb11-2877a9934363>



Clackamas County's share of Metro Supportive Housing Services Measure funding brings approximately \$40.0 million per year to fund services within the Urban Growth Boundary (UGB). Since the Measure's passage, Clackamas County has been working to reallocate other local, state, and federal funding for services outside the UGB. However, the need for households outside of the UGB is far greater than what can be funded currently available resources and the rural areas also lack critical homeless services infrastructure. The funding made available here will help to close this critical gap and help Clackamas County build the more geographically equitable system of care that it has long needed. The County recently entered into a contract with a vendor to carry out a rural area needs assessment and develop a strategic plan. The timing of that work aligns with the opportunity to meet short-term goals now with one-time allocations *and* meet long-term goals with the intentional allocation of ongoing resources to the rural areas, and meet other system needs as part of the overall rebalancing of funding and build-out of services across the whole county.

- 2) MAC teams and CoCs will seek input from disproportionately impacted groups and communities in an ongoing effort to develop a shared understanding of individual and regional challenges facing people experiencing unsheltered homelessness. Please add any additional qualitative or quantitative data or information that was shared to better understand the impact of unsheltered homelessness on their communities.

Clackamas County's Health, Housing & Human Services Department recently consolidated the County's housing and homelessness work into a single new division – Housing and Community Development. As part of this restructuring, the County has embarked on a revision of its advisory structures. The current Housing Services Steering Committee will be



- Need for increased wraparound services in motel shelter programs, including mental health and drug and alcohol services.
- Need for better connection to current resources, such as tenant education programs.
- Need for improved healthcare (including mental health care) services.
- Importance of eviction prevention services tied to on-going longer term support as needed.
- Need for positive social connections and activities once housed (i.e., music, art therapy, gardening, wellness services, etc.)

*Part 2: Impact Analysis*

3) How many people experiencing unsheltered homelessness did your Continuum of Care region house in 2022?

**277**

4) Based on quantitative data and qualitative community input,<sup>2</sup> these three groups have a disproportionately high risk of experiencing unsheltered homelessness:

- a. Subpopulation 1: Native Hawaiian, Pacific Islander: **2.2%**
- b. Subpopulation 2: Black, African American: **17.3%**
- c. Subpopulation 3: Native American, American Indian, Alaska Native: **6.9%**

5) What percentage of people experiencing unsheltered homelessness who exit to permanent housing, return to homelessness within 6 months?

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<sup>2</sup> Based on County racial equity analysis of HMIS and Coordinated Entry data. See also Clackamas County SHS LIP, pp. 10f.

**5.0% of participants who exited from unsheltered homelessness to permanent housing returned to homelessness within 6 months.**

- 6) What percentage of people experiencing unsheltered homelessness who exit to permanent housing, return to homelessness within 6-12 months?

**4.4% of participants who exited from unsheltered homelessness to permanent housing returned to homelessness within 6-12 months.**

- 7) On average, how many people experiencing unsheltered homelessness does your Continuum of Care region exit to permanent housing each month?

**In 2022, the average number of people exited to permanent housing was 23 people per month. This number is expected to increase in 2023 due to increased funding and provider capacity.**

- 8) What culturally specific services are available and accessible to each of the three groups of people experiencing unsheltered homelessness in your Continuum of Care region?

For Question 8 and 9: In response to the gaps identified in our LIP for communities of color, the County made the expansion of culturally specific services one of the top priorities of the first years of SHS implementation. The County now has contracts with culturally specific service providers in each of the subpopulation areas and for BIPOC communities in general. These include: Greater New Hope Family Services and Up and Over, both Black/African American specific; Native American Recovery Association and the Native American Youth and Family Center (the latter, due to staffing challenges, has not yet launched programming), both Indigenous specific; El Programa Hispano Catolica and Casa Esperanza, both Latine specific; and the Immigrant and Refugee Community Organization, BIPOC specific. We therefore have culturally specific services for people identifying with the three subpopulations across the whole continuum of housing services, from street outreach to permanent supportive housing.

- a. Subpopulation 1: Culturally specific outreach, housing navigation and placement, and permanent supportive housing services
  - b. Subpopulation 2: Culturally specific outreach, housing navigation and placement, and permanent supportive housing services
  - c. Subpopulation 3: Culturally specific outreach, housing navigation and placement, and permanent supportive housing services
- 9) What specific services or supports are available for individuals in these groups to access and sustain mainstream (education, health care, Social Security, etc.) services and community connections once people are housed?
- a. Subpopulation 1: Culturally specific housing retention/supportive housing case management
  - b. Subpopulation 2: Culturally specific housing retention/supportive housing case management
  - c. Subpopulation 3: Culturally specific housing retention/supportive housing case management

*Part 3: Community Priorities*

10) Please select **all** local needs that are immediate and major barriers to your Continuum of Care's efforts to support people experiencing unsheltered homelessness in regaining housing, safety, and stability.

- |  |   |
|--|---|
| <input checked="" type="checkbox"/> Housing Affordability                    | <input checked="" type="checkbox"/> Service Providers – Organizational Capacity |
| <input checked="" type="checkbox"/> Emergency Shelter Shortage               | <input checked="" type="checkbox"/> Service Providers – Staff/Salary            |
| <input type="checkbox"/> Street Outreach Services                            | <input checked="" type="checkbox"/> Service Providers – Specific Expertise      |
| <input type="checkbox"/> Affordable Housing Landlord Engagement              | <input checked="" type="checkbox"/> Medical Care                                |
| <input checked="" type="checkbox"/> Substance Use Disorder Care and Services | <input checked="" type="checkbox"/> Skilled Nursing Facility Care               |
| <input checked="" type="checkbox"/> Mental Health Care and Services          | <input checked="" type="checkbox"/> Nursing Home Shortage                       |
| <input type="checkbox"/> Rapid Rehousing Projects                            | <input type="checkbox"/> Manufactured Housing                                   |
|  | <input type="checkbox"/> Housing Development                                    |

- Flexible System Funding/Costs
- Cleaning or maintenance (e.g., hoarding prevention)
- Housing-focused Case Management
- Housing problem-solving assistance
- Conflict mediation Services
- Housing Navigation Services
- Tenant-based rental assistance
- Project-based rental assistance
- Housing Choice Vouchers
- Targeted subsidies
- Rent buy-down
- Family reunification transportation assistance
- Flexible emergency funding
- Food security payments
- Marketing materials
- Operating costs
- Other flexible forms of financial assistance
- Other renovations
- Peer support Services
- Planning and development
- Project management
- Repairing damages
- Room and board payments
- Security deposits
- Service coordination and integration
- Signing bonuses
- Staffing
- Transportation assistance



11) For each of the three subpopulations identified above as **disproportionately likely** to experience unsheltered homelessness in your region, please identify **which** of these needs most **significantly** and **specifically** impact their ability to regain and retain housing.

- Subpopulation 1: Service provider **capacity** challenges, staffing; for people in rural areas, the lack of tenant- or project-based rental assistance; for all **populations**, housing affordability and gaps in physical and behavioral health care services.
- Subpopulation 2: Service provider **capacity** challenges, staffing; for people in rural areas, the lack of tenant- or project-based rental assistance; for all **populations**, housing affordability and gaps in physical and behavioral health care services.
- Subpopulation 3: Service provider **capacity** challenges, staffing; for people in rural areas, the lack of tenant- or project-based rental assistance; for all **populations**, housing affordability and gaps in physical and behavioral health care services.

12) Please list the region's five most urgent and critical (important but not immediately time sensitive) unmet needs, choosing from the selected list above.

- Most Urgent: **Housing Affordability**
- Urgent and Critical: **Service Providers – Organizational Capacity**
- Time Sensitive and Very Important: **Service Providers – Staff/Salary**
- Not Time Sensitive but Very Important: **Mental Health Care and Services**
- Important: **Substance Use Disorder Care and Services**

## Goal Setting

Each region will determine priority strategies that will target its All In investments across its three goals. MAC teams and CoCs will

rely on the data and community analysis above to inform which of these strategies to prioritize. MAC teams and CoCs may gather additional data to better understand what local capacity and limitations should guide these investments.

Based on the supports most needed and the services currently available in your region, please check **only** the boxes for the investment strategies that would **most benefit** your community's efforts to rehouse people experiencing unsheltered homelessness.

*Part 1: Strategies to prevent unsheltered homelessness*

Technical assistance and support to integrate **housing problem-solving into street outreach.**

**D** Food security payments

**r8J** Other flexible forms of financial assistance

Offering **flexible housing-related funding for institution-involved families, youth, and single adults** who formerly exited or are currently exiting a publicly funded child welfare and foster care, juvenile and adult corrections, long-term care, health, and mental health and substance use treatment facility by providing flexible funding that to reduce housing instability. Eligible activities include:

- Housing-focused case management
- Service coordination and integration
- Targeted subsidies
- Flexible emergency funding
- Room and board payments
- Transportation assistance

Offering **flexible housing-related funding for older adults and people with disabilities** – including people with mental health conditions and/or substance use disorders –to reduce housing instability by providing access to housing-related home- and community-based services. Eligible activities include:

- Housing-focused case management
- Service coordination and integration
- Targeted subsidies
- Flexible emergency funding
- Room and board payments
- Transportation assistance
- Food security payments

Other flexible forms of financial assistance

Funding **encampment-specific prevention and shelter diversion to permanent housing or family reunification** (if safe and appropriate) to prevent people that have been placed into permanent housing from losing their housing and falling back into unsheltered homelessness. Eligible activities include:

- Housing-focused outreach
- Housing-focused case management
- Family reunification transportation assistance
- Housing problem-solving assistance
- Flexible emergency funding

**Expand or establish geographically robust street outreach efforts** that provide access to the full menu of services available in your community. Eligible activities include:

- Service coordination and integration
- Harm reduction training
- Peer support
- Housing problem-solving assistance
- Conflict mediation
- Family reunification transportation assistance

*Part 3: Strategies to rapidly rehouse individuals and families experiencing unsheltered homelessness*

Technical assistance and support to establish or strengthen your Continuum of Care region's **relationship with Public Housing Authorities** to coordinate on securing available voucher resources to rehouse individuals and families experiencing unsheltered homelessness.

Technical assistance and support to examine, revise or strengthen your Continuum of Care region's **coordinated entry** prioritization policies and practices to rapid rehouse individuals and families experiencing unsheltered homelessness.

**Technical assistance and support to analyze your Continuum of Care region's funding portfolio** to identify braided funding opportunities to increase its capability to rapidly rehouse individuals and families experiencing unsheltered homelessness.

Technical assistance and support to develop and implement an **encampment strategy** to focus rehousing efforts and reduce the number of encampments.

Expand or develop a **landlord incentive package** to establish a pool of units with reduced or eliminated tenancy screening criteria to rehouse people experiencing unsheltered homelessness. Eligible activities include:

- Planning and development
- Marketing materials
- Holding fees
- Signing bonuses
- Security deposits
- Rent buy-down
- Repairing damages
- Cleaning or maintenance (e.g., hoarding prevention)

Develop and implement a **housing surge and/or housing fair**. Eligible activities include:

- Staffing
- Admin
- Project management
- Fiscal Agent
- Tenant-based rental assistance
- Housing-focused case management
- Third-party inspection services

Develop and implement a **master leasing program**. Eligible activities include:

- Staffing



Description: This investment will build on Clackamas County's existing Rapid Rehousing programming that assists households experiencing homelessness or living in temporary housing move into permanent housing solutions. This expansion will help fill critical services gaps in rural parts of the county. This type of program is designed for those who have recently become homeless or are on the verge of becoming homeless as they often have similar needs. Housing navigation, case management, and short-term rental assistance will be provided to facilitate their move and ensure housing stability and retention.

### Goals

Please identify what goals your Continuum of Care is prepared to set and work toward this year for each area, assuming financial support from the state for implementing some or all the strategies marked above, as well as technical assistance and collaboration.

Quantify your goal to contribute towards this statewide effort and identify the number of households, beds, and/or people you will be able to serve with additional resources.

Rapidly Rehouse

Our CoC Region will rapidly rehouse 130 people experiencing unsheltered homelessness by this date: 1/10/2024.

- Admin
- Project management
- Fiscal Agent
- Project-based rental assistance
- Housing-focused case management
- Third-party inspection services
- Operating costs

*Milestones*

Please provide a timeline of milestones your Continuum of Care region proposes to mark progress, evaluate strategies, and improve operations to achieve the goals identified above, contingent on funding, in partnership with OHCS and OEM.

Month	Progress Milestones	Systems Improvement Actions
March 2023	<ol style="list-style-type: none"> <li>1) Add additional MAC Group members to meet State requirements for representation and convene.</li> <li>2) Complete Community Plan for resubmission.</li> <li>3) Internal review of grant agreement.</li> </ol>	<ol style="list-style-type: none"> <li>1) Increase system coordination through the formation of the MAC Group.</li> <li>2) Continue work related to reducing Coordinated Housing Access wait times, by name case conferencing, and Built for Zero goals.</li> </ol>
April	<ol style="list-style-type: none"> <li>1) Receive allocation amount from OHCS.</li> <li>2) Gain Board approval of Grant Agreement.</li> <li>3) Continue assessment of system gaps in partnership with MAC Group and determine one-time allocation amounts across provider contract budgets and/or County direct-service programs to quickly make progress on stated goals.</li> </ol>	<ol style="list-style-type: none"> <li>1) Gain Board approval for homeless services advisory body restructure.</li> <li>2) Initiate engagement with vendor carrying out rural Clackamas County needs assessment and strategic planning.</li> <li>3) Continue work related to reducing Coordinated Housing Access wait times, by name case conferencing, and Built for Zero goals.</li> </ol>

<p style="text-align: center;">May</p>	<p>1) Continue assessment of system gaps in partnership with MAC Group and determine one-time allocation amounts across provider contract budgets and/or County direct-service programs to quickly make progress on stated goals. 2) Negotiate provider contract budgets and complete contract amendments to incorporate new one-time funding and expand service levels to meet stated goals.</p>	<p>1) Begin recruitment for new homeless services advisory body members. 2) Continue engagement with vendor carrying out rural Clackamas County needs assessment and strategic planning. 3) Continue work related to reducing Coordinated Housing Access (CHA) wait times, by name case conferencing, and Built for Zero goals.</p>
<p style="text-align: center;">June</p>	<p>1) Convene MAC Group to continue discussion of system gaps, with specific eye towards incorporating ongoing State funds for services outside of the Urban Growth Boundary. 2) Service provider ramp-up to deliver services.</p>	<p>1) Execute contract with homeless services advisory convener. 2) Continue engagement with vendor carrying out rural Clackamas County needs assessment and strategic planning. 3) Engage with service providers to ensure progress on spending/ability to deliver services towards stated goals and address needs/gaps. 4) Continue CHA, by name list, and Build for Zero work/improvement.</p>

<p style="text-align: center;">July</p>	<p>2) Rapid Rehousing Goal: 6 total placements</p>	<p>1) Initial convening of new homeless services advisory body.                  2) Continue engagement with vendor carrying out rural Clackamas County needs assessment and strategic planning.                  3) Engage with service providers to ensure progress on spending/ability to deliver services towards stated goals and address needs/gaps.                  4) Continue CHA, by name list, and Build for Zero work/improvement.</p>
<p style="text-align: center;">August</p>	<p>2) Rapid Rehousing Goal: 12 total placements</p>	<p>1) Start strategic planning with new homeless services advisory body.                  2) Assess and provide feedback on initial report produced by rural needs assessment and strategic planning vendor.                  3) Engage with service providers to ensure progress on spending/ability to deliver services towards stated goals.                  4) Continue CHA, by name list, and Build for Zero work/improvement.</p>



September	<p>2) Rapid Rehousing Goal: 23 total placements</p> <p>3) Receive final rural needs assessment and strategic plan, share findings with MAC Group.</p> <p>4) Establish framework for reallocation of ongoing resources to rural areas.</p>	<p>1) Continue strategic planning with new homeless services advisory body.</p> <p>2) Reallocate resources as needed across provide contract budgets based on progress towards stated goals.</p> <p>3) Continue CHA, by name list, and Build for Zero work/improvement.</p>
October	<p>2) Rapid Rehousing Goal: 52 total placements</p> <p>3) Write and open allocation (procurement) for ongoing rural services based on needs assessment and strategic planning.</p>	<p>1) Continue strategic planning with new homeless services advisory body.</p> <p>2) Continue CHA, by name list, and Build for Zero work/improvement.</p>
November	<p>2) Rapid Rehousing Goal: 81 total placements</p> <p>3) Close allocation for ongoing rural services.</p>	<p>2) Continue CHA, by name list, and Build for Zero work/improvement.</p>
December	<p>2) Rapid Rehousing Goal: 109 total placements</p> <p>3) Score and select vendors for ongoing rural services.</p>	<p>1) Continue CHA, by name list, and Build for Zero work/improvement.</p>

<b>Project Type</b>	<b>Units Available*</b>	<b>Total Units</b>	<b>Avg. Cost Per Unit</b>
Emergency Shelter Beds - Adult Only	46	49	\$52,170
Emergency Shelter Beds - Adults with Children	60	64	\$30,589
Emergency Shelter Beds - Youth	25	26	\$22,610
Transitional Housing	42	44	\$17,183
Joint Transitional Housing/Rapid Rehousing	35	37	\$18,634
Rapid Rehousing	153	161	\$15,120
Permanent Supportive Housing	58	61	\$18,139
Other Permanent Housing	423	445	\$9,897
Housing Choice Vouchers	1950	2050	\$11,642
<b>Service Type</b>	<b>Slots Available</b>	<b>Total Slots</b>	<b>Avg. Cost Per Service</b>
Outreach	1520	1600	\$1,338

Rental Assistance	545	574	\$12,381
Case	915	963	\$6,309
Landlord Engagement	38	40	\$1,000
Housing	695	732	\$5,443

\*Estimated based on full system utilization and routine turnover.

**Current Investments**

Project Type	City	County	Regional	State	Federal	Private	Total
Emergency Shelter Beds - Adult Only		\$400,000	\$2,556,348				\$2,956,348
Emergency Shelter Beds - Adults with Children		\$331,921	\$1,957,688				\$2,289,609
Emergency Shelter Beds - Youth			\$587,851				\$587,851
Transitional Housing			\$756,032				\$756,032
Joint Transitional Housing/Rapid Rehousing					\$992,607		\$992,607
Rapid Rehousing		\$226,000	\$786,991	\$370,310	\$833,439		\$2,216,740

Permanent Supportive Housing	\$536,520		\$778,420	\$1,719,591		\$3,034,531
Other Permanent Housing			\$325,658	\$4,403,974		\$4,729,632
Housing Choice Vouchers				\$23,865,997		\$23,865,997
<b>Service Type</b>						\$0
Outreach	\$400,000	\$2,665,175	\$94,080	\$349,401		\$3,508,656
Rental Assistance		\$8,100,298	\$2,331,256	\$1,985,457		\$12,417,011
Case Management		\$4,148,223				\$4,148,223
Landlord Engagement		\$40,000				\$40,000
Housing Navigation	\$400,000	\$4,335,575				\$4,735,575
<b>Total Investments</b>	<b>\$0</b>	<b>\$2,294,441</b>	<b>\$25,934,181</b>	<b>\$3,899,724</b>	<b>\$34,150,466</b>	<b>\$0</b>
						<b>\$66,278,812</b>

*\*Includes both county-direct and community-direct CoC allocations.*

*\*\*Includes remaining balances of one-time COVID-related rent assistance funding and other one-time allocations.*

Exhibit C

**Insurance Requirements**  
**Risk Assessment Insurance Summary**

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**Service Procurement**

Summary Document to Assist with Insurance Requirement Template

This risk assessment insurance summary is based off of a risk assessment and is meant to be used as a guide. If a different conclusion is made, document the reasoning.

**COMMERCIAL GENERAL LIABILITY:**

Required

Coverage shall be written on an occurrence basis in an amount of not less than \$1,000,000 per occurrence.  
Annual aggregate limit shall not be less than \$2,000,000 .

**AUTOMOBILE LIABILITY:**

Required  Not Required

Coverage shall be written on a combined single limit of not less than \$1,000,000 .

**PROFESSIONAL LIABILITY: (For Medical and Health Services)**

Required  Not Required

Coverage shall be written on an occurrence basis in an amount of not less than \_\_\_\_\_ per claim.  
Annual aggregate limit shall not be less than \_\_\_\_\_ .

**PROFESSIONAL LIABILITY: (For other than Medical & Health Services or IT Services)**

Required  Not Required

Coverage shall be written on an occurrence basis in an amount of not less than \$ 2,000,000 per claim.  
Annual aggregate limit shall not be less than \$ 4,000,000 .

**NETWORK SECURITY AND PRIVACY LIABILITY:**

Required  Not Required

Coverage shall be written on an occurrence basis in an amount of not less than \$1,000,000 per claim.

**POLLUTION LIABILITY:**

Required  Not Required

Coverage shall be written on an occurrence basis in an amount of not less than \_\_\_\_\_ per occurrence.  
Annual aggregate limit shall not be less than \_\_\_\_\_ .

**DIRECTORS AND OFFICERS:**

Required  Not Required

Coverage shall be written on a combined single limit in an amount of not less than \$2,000,000 .

**CRIME PROTECTION:**

Required  Not Required

Coverage shall be written on a combined single limit in an amount of not less than \$2,000,000 .

**PHYSICAL ABUSE AND SEXUAL MOLESTATION:**

Required  Not Required

Coverage shall be written on an occurrence basis in an amount of not less than \$1,000,000 per occurrence.  
Annual aggregate limit shall not be less than \$3,000,000 .

**MOTOR CARRIER AND CARGO:**

Required  Not Required

Coverage shall be written on a combined single limit in an amount of not less than \_\_\_\_\_ .

**DRONE / UNMANNED AIRCRAFT SYSTEMS (UAS) / UNMANNED AERIAL VEHICLE (UAV) LIABILITY:**

Required  Not Required

Coverage shall be written on a combined single limit in an amount of not less than  .

**AIRCRAFT LIABILITY:**

Required  Not Required

Coverage shall be written on a combined single limit in an amount of not less than  .

**AIR CARGO LIABILITY:**

Required  Not Required

Coverage shall be written on a combined single limit in an amount of not less than  .

**AIRCRAFT AERIAL APPLICATION LIABILITY:**

Required  Not Required

Coverage shall be written on a combined single limit in an amount of not less than  .

**GARAGE LIABILITY:**

Required  Not Required

Coverage shall be written on a combined single limit in an amount of not less than  .

**GARAGEKEEPERS LEGAL LIABILITY:**

Required  Not Required

Coverage shall be written on a combined single limit in an amount of not less than  .

**BAILEE'S:**

Required  Not Required

Coverage shall be written on a combined single limit in an amount of not less than  .

**MARINE PROTECTION LIABILITY:**

Required  Not Required

Coverage shall be written on a combined single limit in an amount of not less than  .

---

**Risk Assessment Insurance Summary**

---

**Goods Procurement**

Summary Document to Assist with Insurance Requirement Template

This risk assessment insurance summary is based off of a risk assessment and is meant to be used as a guide. If a different conclusion is made, document the reasoning.

**COMMERCIAL GENERAL LIABILITY:**

Required

Coverage shall be written on an occurrence basis in an amount of not less than \$1,000,000 per occurrence.  
Annual aggregate limit shall not be less than \$2,000,000 .

**NOTES:**

## Grant Agreement

### State of Emergency Due to Homelessness

#### Amendment #1

This Amendment #1 (this “Amendment”) to Agreement #OR-507, as amended from time to time (“Agreement”) is by and between the State of Oregon (“State”), acting by and through its Housing and Community Services Department (“Agency”), and Clackamas County (“Recipient”), an Oregon Local Government Entity.

#### RECITALS

- A. Agency desires to Amend the Agreement to change the Insurance Requirements in Section 19.

#### AMENDMENT

1. Section 19 of the Agreement is hereby amended as follows effective upon signatures by all parties and approvals as required by law. New language indicated by **bold and underline** and deleted language indicated by ~~strikethrough~~:

19. **Insurance**

19.1 Recipient shall insure, or self-insure, and be independently responsible for the risk of its own liability for claims within the scope of the Oregon Tort Claims Act (ORS 30.260 through 30.300).

19.2 ~~Recipient shall require its first tier contractor(s) that are not units of local government as defined in ORS 190.003, if any, to obtain the insurance specified in Exhibit C.~~ **Recipient shall require subcontractors to maintain insurance coverages that meet or exceed Recipient’s standard policies and practices with respect to the subcontracted activities, and which in all cases shall be no less than commercially reasonable insurance coverages, consistent with applicable industry standards.**

2. Exhibit C is removed in its entirety upon signatures by all parties and approvals as required by law.
3. Except as expressly amended above, all other terms and conditions of the Agreement, as amended, remain in full force and effect.
4. **Counterparts**



This Amendment may be executed in several counterparts, all of which when taken together shall constitute one agreement, notwithstanding that all Parties are not signatories to the same counterpart. Each copy of the Agreement so executed constitutes an original.

**5. Signatures**

**Oregon Housing & Community Services**

DocuSigned by:  
*Sandra Flickinger*  
4041B29D2A0B49F...  
\_\_\_\_\_  
**Signature**

Sandra Flickinger,  
Designated Procurement Officer  
**Printed Name & Title**

8/22/2023  
\_\_\_\_\_  
**Date**

**Clackamas County**

*Gary Schmidt*  
\_\_\_\_\_  
**Signature**

Gary Schmidt, County Administrator  
**Printed Name & Title**

07/27/2023  
\_\_\_\_\_  
**Date**

**EXHIBIT J**  
**PERSONAL SERVICES CONTRACT**  
**EO 23-02 PROCESS FOR SYSTEM ADMINISTRATORS**



**EO 23-02 Process for  
System Administrators**

Oregon Housing and Community Services (OHCS)

Oregon Multi-CoC (OMC) HMIS Team

[HCS.HMISHelp@hcs.oregon.gov](mailto:HCS.HMISHelp@hcs.oregon.gov)

Published date: May 16, 2023

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## Introduction

**This guide is intended ONLY for HMIS system administrators. For agency admin or users, please coordinate with your CoC HMIS Lead and/or system administrators.**

On January 10, 2023, the governor of Oregon signed into effect Executive Order No. 23-02, which declares a state of emergency due to homelessness. The intent of EO 23-02 is to expand the state’s low-barrier shelter capacity, to rehouse people experiencing unsheltered homelessness, and to prevent homelessness to the greatest extent possible. This EO remains in effect until January 10, 2024, unless extended or terminated earlier by the Governor. [Executive Order 23-02](#) is currently available on the state of Oregon’s website, under the executive order webpage. For more details on the EO, please use the link above.

OHCS and the Governor’s Office are referring to this fund as “**EO 23-02.**”

## HSS Resources & Contacts

Data Collection Requirements for FY23			
	EO 23-02		
DATA ELEMENT or EVENT	SO	ES	RRH
Name & Name Data Quality	X	X	X
Social Security No. & Data Quality	X	X	X
Date of Birth and DOB Data Quality	X	X	X

For data expectations and data element information, please refer to the EO 23-02 MGA as well as the [Homeless Services Section Dashboard](#). In the section titled “21-23 Contract Information & Resources,” there is a resource called the “[Data Crosswalk for Data Requirements](#).” This resource details which data elements are required for the program, broken down by project type. **Please refer here for more information on data element requirements.**

If you have questions relating to the fund and/or the program itself, please contact [EO2302.questions@HCS.oregon.gov](mailto:EO2302.questions@HCS.oregon.gov).

EO 23-02 projects are collecting UDEs (Universal Data Elements) and program specific data elements as well as service transaction information. **Review the [Data Crosswalk for Data Requirements](#) resource for more information.**

For additional information or questions about the HMIS system, please contact the OHCS HMIS team at [HCS.HMISHelp@hcs.oregon.gov](mailto:HCS.HMISHelp@hcs.oregon.gov).

## System & Data Requirements for EO 23-02 Providers

Program providers in the system will need to be set-up a specific way and have some additional requirements, depending on project type. For HMIS system administrators, refer below for more information on project set-up:

### Emergency Shelter (ES)

If the executive order (EO) is adding beds to an existing shelter, the HMIS administrator needs to create a new project in HMIS to account for the new inventory. EO 23-02 funds cannot be used to support existing inventory. This is so OHCS and the governor's office can determine exactly where and how EO 23-02 funds are implemented. *For further information on program guidance, please email the OHCS program team at the email listed above.* **All EO 23-02 funded ES projects are required to use ShelterPoint.**

For project set-up:

- **Project Name** is at user discretion but can include "EO 23-02."
  - E.g. **OMC – EO 23-02 – SHELTERPOINT**
- Add a local fund called "EO 23-02" to the **Federal Partner Program and Components** section of the provider profile. See [Appendix A](#) for instructions on how to add this information.
- Service transactions for direct payment services must be associated to the "EO 23-02" fund source in HMIS. This means that EO 23-02 project(s) needs to be added to the fund via **FundManager**. *Reach out to your HMIS System Administrator for assistance if needed.*

### Rapid Rehousing (RRH)

If the EO 23-02 funds are adding vouchers and/or beds to an existing RRH project, then these additions need to be set-up as a new project by the HMIS Lead or administrator. This is so OHCS and the governor's office can determine exactly where and how EO 23-02 funds are implemented.

For project set-up:

- **Project Name** should include "EO 23-02."
  - E.g. **OMC – EO 23-02 – RRH**
- Add a local fund called "EO 23-02" to the **Federal Partner Program and Components** section of the provider profile. See [Appendix A](#) for instructions on how to add this information.
- Service transactions for direct payment services must be associated to the "EO 23-02" fund source in HMIS. This means that EO 23-02 project(s) needs to be added to the fund via **FundManager**. *Reach out to your HMIS System Administrator for assistance if needed.*

### Eviction Prevention

Homelessness prevention funding for EO 23-02 will continue to go to the CAAs and CoCs, which will require the creation of new providers in HMIS. *Service transactions for all EO 23-02 Eviction Prevention providers can start being tracked and entered in HMIS as of 01/10/2023 and ongoing.*

- **Project Type** for new EO 23-02 providers must be **Services Only (HUD)**
- **Project Name** should be "EO 23-02 Eviction Prevention."
  - E.g. **OMC – EO 23-02 Eviction Prevention**
- Add a local fund called "EO 23-02" to the **Federal Partner Program and Components** section of the provider profile. See [Appendix A](#) for instructions on how to add this information.
- Service transactions for direct payment services must be associated to the "EO 23-02" fund source in HMIS. This means that EO 23-02 project(s) needs to be added to the fund via **FundManager**. *Reach out to your HMIS System Administrator for assistance if needed.*

### EO 23-02 Reporting

The following reports need to be submitted:

#### OHCS Monthly Query

This report is submitted monthly, on the 20<sup>th</sup> of each month, by uploading to Procorem. The report can be generated via SAP BO and is in the "OMC Standard Reports" folder.

**Please refer to the “OHCS Monthly Query Process” process guide for more information.** The Monthly Query data may be submitted by the HMIS administrator for all OHCS funded HMIS participating Agencies/Providers in the HMIS instance.

### Monthly Housing Inventory (HIC)

Bed/Unit Inventory updates must be submitted 20 days following the end of each month. The baseline HIC report can be a copy of what was submitted to HUD via HDX for 2023 or it can be an excel spreadsheet of the CoC’s Housing Inventory which is maintained outside of HMIS. These reports must be emailed to the HSS Reporting inbox at [HCS.REPORTING@HCS.oregon.gov](mailto:HCS.REPORTING@HCS.oregon.gov).

### OHCS Quarterly Status Report

This report is submitted 20 days following the end of each quarter and is emailed to the HSS Reporting inbox at [HCS.REPORTING@HCS.oregon.gov](mailto:HCS.REPORTING@HCS.oregon.gov). **For more information, please refer to the “OHCS Quarterly Reporting Process” document.** The quarterly status report may be submitted by the HMIS administrator for all OHCS funded HMIS participating Agencies/Providers in the HMIS instance.

### Biannual System Performance Measure Reports (SPMs)

SPMs for the CoC and for EO 23-02 funded projects are due 20 days following the end of each month. These are “canned” reports found in WellSky Community Services (ServicePoint). These reports can be emailed to the HSS Reporting inbox at [HCS.REPORTING@HCS.oregon.gov](mailto:HCS.REPORTING@HCS.oregon.gov). **Instructions on how to format and generate these reports are located on the “OHCS System Performance” process guide.**

## Appendix A: Adding Local Fund Information

Under the *Profile>Standards Information* tabs, and in the *Federal Partner Program and Components* section, put in the following fund information and click “**Save**”:

- **Federal Partner Program:** Local or Other Funding Source (Please Specify)
- **If Other, Specify:** OHCS
- **Grant Identifier:** EO 23-02
  - **If creating an ES project, input the grant identifier as:**
    - EO 23-02 – CONGREGANT LOW BARRIER **OR**
    - EO 23-02 – NON-CONGREGANT LOW BARRIER

Grant Identifier
EO 23-02 - Congregant Low Barrier

Grant Identifier
EO 23-02 - Non-Congregant Low Barrier

- **Grant Start Date:** Enter an appropriate start date
- **Grant End Date:** Leave blank. *Once the fund has been fully expended, the end date can be added to the fund line.*

**Federal Partner Program and Components**

**Add Federal Partner Program and Components**

<b>Federal Partner Program</b> *	Local or Other Funding Source (Please Specify) ▾
If Other, Specify	OHCS
<b>Grant Identifier</b> *	EO 23-02
Grant Start Date	01 / 01 / 2023
Grant End Date	/ /

Federal Partner Program and Components			
	Federal Partner Program	Grant Identifier	Grant Start Date
	Local or Other Funding Source (Please Specify)	EO 23-02	01/01/2023
<input type="button" value="Add Federal Partner Program"/>		Showing 1-1 of 1	



