

July 17, 2025

BCC Agenda Date/Item: _____

Board of County Commissioners
Clackamas County

Approval of an Amendment to a Personal Services Contract with ASSIST for Social Security Disability Insurance application aides. Amendment Value is \$600,000 for 2 years. Total Contract Value is \$1,050,000 for 3 years. Funding is through Supportive Housing Services Measure funds. No County General Funds involved.

Previous Board Action/Review	<ul style="list-style-type: none"> Original Contract approved, April 11, 2024 –20240411 II.D.5 Amendment #1 approved by the Department August 14, 2024 Amendment #2 approved by the Department June 16, 2025 		
Performance Clackamas	<ol style="list-style-type: none"> This programming aligns with H3S's Strategic Action Plan goal to increase self-sufficiency for our clients. This funding aligns with the County's Performance Clackamas goal to ensure safe, healthy, and secure communities. 		
Counsel Review	Yes: Amanda Keller	Procurement Review	No
Contact Person	Vahid Brown, HCDD Deputy Dir.	Contact Phone	(971) 334-9870

EXECUTIVE SUMMARY: On behalf of the Housing and Community Development Division (HCDD), the Health, Housing, and Human Services Department requests approval of Amendment 3 to contract 11467 with ASSIST for a Social Security Disability Insurance Recovery Services program to assist households experiencing homelessness in Clackamas County.

ASSIST helps individuals with serious mental illness, physical/medical impairments, and/or those suffering from substance use disorders who are seeking treatment, to apply for Social Security Disability Insurance Recovery services. They also provide non-attorney legal representation to individuals who cannot navigate the benefits application process on their own, with the intention of expediting the approval process by keeping their clients' cases out of the multi-year appeals process.

This program will provide three dedicated staff members who will conduct approximately 60 new individual one-on-one referral consultations with residents applying for Social Security Income (SSI) or Social Security Disability Income (SSDI), in addition to maintaining the current caseload of 30+ individuals in the program. For those in this program, staff will provide representation throughout the full adjudicative process of applying for SSDI, as well as facilitate connections to stable housing and wrap-around services.

Funding for this amendment is provided through Supportive Housing Services Funds. No County General funds are involved.

For Filing Use Only

RECOMMENDATION: Staff respectfully request that the Board of County Commissioners approve this Amendment to the Contract (11467) with ASSIST and authorize Chair Roberts, or his designee, to sign on behalf of Clackamas County.

Respectfully submitted,

A handwritten signature in black ink that reads "Mary Rumbaugh". The script is cursive and fluid, with the first letters of each word being capitalized and prominent.

Mary Rumbaugh
Director of Health, Housing & Human Services

**AMENDMENT #3
TO THE CONTRACT DOCUMENTS WITH ASSIST FOR PROVIDING SOCIAL SECURITY
DISABILITY INSURANCE RECOVERY SERVICES
Contract # 11467**

This Amendment #3 is entered into between **ASSIST** ("Contractor") and Clackamas County ("County") and shall become part of the Contract documents entered into between both parties on **May, 11 2024**. ("Contract").

The Purpose of this **Amendment #3** is to make the following changes to the Contract:

1. ARTICLE I, Section 2. **Scope of Work** is hereby amended as follows:

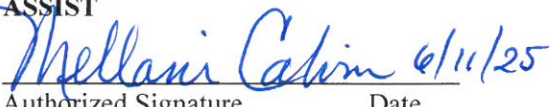
Exhibit A to the Contract is hereby deleted in its entirety and replaced with **Exhibit A to this Amendment #3**, attached hereto and incorporated herein. Contractor agrees to perform the Work described in **Exhibit A to this Amendment #3**.

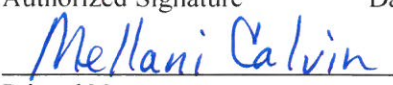
2. ARTICLE I, Section 3. **Consideration** is hereby amended as follows:

In consideration for Contractor performing Work during the extended term of this Contract, County will pay Contractor an amount not to exceed \$600,000.00. The annual not to exceed value for performing the Work is set forth in the table in Exhibit B. For the fiscal year FY 25-26, the annual total contract value will not exceed \$300,000. Consideration rates are on a reimbursement basis in accordance with the budget set forth in **Exhibit B to this Amendment #3**, attached hereto and incorporated by this reference herein, and the terms of the Contract. The total Contract compensation will not exceed \$1,050,000.00.

ORIGINAL CONTRACT	\$	450,000.00
AMENDMENT #1	\$	Language change
AMENDMENT #2	\$	Time Extension
AMENDMENT#3	\$	600,000.00
TOTAL AMENDED CONTRACT	\$	1,050,000.00

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 #3, effective upon the date of the last signature below.

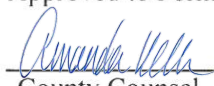
ASSIST


Authorized Signature Date


Printed Name

Clackamas County

Signature Date

Name
Approved to Form:


County Counsel Date

Exhibit A

Scope of Work

Contractor will provide Social Security Disability Insurance Recovery Services to Regional Long-term Rental Assistance voucher holders (RLRA) in Clackamas County by expediting benefits approvals and with the intent of keeping their clients' cases out of the multi-year appeals process, while following the practices and performance standards stated below.

Contractor will provide comprehensive SSI/SSDI application assistance for individuals with serious mental illness, physical/medical impairments and/or co-occurring substance use disorder. Contractor will represent their clients throughout the entire adjudicative process. Contractor will keep meticulous data and statistics on their program outcomes and appeals if appeals are necessary.

Contractor's work is based on a national model, a SAMHSA supported service program for disabled homelessness called SOAR, SSI/SSDI Outreach, Access and Recovery; and focuses on supporting ongoing casework with significantly disabled and indigent Clackamas County residents in FY 25/26.

Contractor will work within a proactive case management model and legal representation of people who cannot navigate the often-multi-year benefits application process on their own. This is a critical "front door key" to many other services the County provides once they have been "deemed" disabled by the federal government.

Contractor is an income-generating program for the client that helps people become eligible for categorical Medicaid for the blind, aged or disabled (non-waivered Medicaid as opposed to the ACA or OHP) and Medicare health insurance. Access to critical state and county disability programs.

This program will provide 3.0 dedicated staff (FTE) that will support approximately 60 new individuals per year with the SSI/SSDI application process or other Social Security benefits as needed; in addition to maintaining a caseload of 30+ existing open cases. Referrals for this program will come from multiple sources and must be Clackamas County individuals who are RLRA voucher holders or receiving retention services, within the Metro Urban Growth Boundary. Contractor will report capacity to the Housing Services Team (HST).

In addition to serving these 60 new participants per year, it is estimated that approximately 6 individuals per week (approx. 300 annually) will receive one-on-one consultations focused on benefits eligibility screening and potential income pathways—whether or not they are enrolled into the program. These consultations align with the County's Move Forward initiative.

Contractor will provide the following services:

- Comprehensive SSI/SSDI application assistance for individuals with serious mental illness, physical/medical impairments and/or co-occurring substance use disorder
- Benefits Specialists casework application navigation and legal representation through the full adjudicative process.
- Director level casework supervision.
- Administrative/Clerical casework support.

- Director level program introduction meeting time to promote the service to other community service providers throughout the county.
- Telephone consultations to the public as subject matter experts.
- Consultations of new referrals that Contractor does not enroll into the program (Contractor provides education and advice on the benefits application process.).
- Medical appointment coordination and client transportation as needed for the application process
- Client diagnostic evaluation expenses on behalf of Contractor clients with significant mental health impairments (Average \$600 to \$1,850 per case)
- Direct client purchases and related expenses as they pertain to the lengthy application process such as: Bus tickets, gas cards, cell phones and other purchases that allow clients to stay fully engaged with the benefits specialists during the lengthy process.
- Weekly open office hours with case managers, via in-person, Zoom, or phone appointments, with notes documented for each
- Referrals to other state programs, such as DHS/APD Pre-SSI, when appropriate

Contractor will provide outreach and engagement, connections to coordinated housing access, and wrap around services to include rendering the items listed above to participants of the County's Supportive Housing Services program, as those terms are defined in the Washington County Purchase Agreement# 187164.

Goals and Benchmarks (Timeline)

This is a pilot program. Contractor and County will meet 60 days after the pilot launch to evaluate program satisfaction according to the benchmarks listed below.

Contractor and County will meet at least 60 days before the end of the pilot program to evaluate outcomes and the County will determine, in its sole discretion, whether to start negotiations on a new contract based on the results of this pilot program.

Goals will be pro-rated yearly.

Goal	Completion Timeline
Contractor will conduct approximately 300 income and benefit screening consultations annually for RLRA voucher holders, in coordination with the County's Move Forward initiative. These screenings will help determine eligibility for SSI/SSDI and other income sources; at least 60 of these individuals are expected to move forward into full benefits assistance services with the Contractor.	Annually
Contract will enroll and provide outreach and engagement services to approximately 60 new Clackamas County individuals per year, prioritizing RLRA voucher holders. Contractor will also continue serving approximately 30+ individuals with active ongoing cases.	Annually
Contractor will provide wrap around support services to participants to assist with developing medical case for disability benefit approval.	Annually
Contractor will provide an in person training to Housing Providers within 90 days of contract signing with the support of Housing Services Team. Ongoing zoom trainings approximately two times per year at CoC and	Within 90 days of contract signing for in person Training

Retention meetings.	
Contractor will track HMIS#'s on referral form, attached and incorporated herein as Exhibit D, and will provide a report on referrals accepted and stages of application upon entry vs where they are now in the disability benefits process. Enrollments, referrals, approvals and ongoing active case numbers.	Quarterly

Exhibit B
Budget



Clackamas County ASSIST Program, Federal Disability Benefits Service Expansion			
	FY 25-26	FY 26-27	
	Year 1	Year 2	Notes
Grant revenues	\$ 300,000.00	\$ 300,000.00	\$600k spread over 2 years
Expenses:			
Salaries and wages	\$ 205,088.00	\$ 205,088.00	3 FTE equivalent of staff
Payroll Taxes	\$ 19,497.08	\$ 19,497.08	
Benefits	\$ 13,491.96	\$ 14,166.56	
Total salaries, taxes & benefits	\$ 238,077.04	\$ 238,751.64	
Client Services	\$ 27,500.00	\$ 27,500.00	60 cases w/33% needing psych evaluations; evals costs between \$600 up to \$1,850/each Other client expenses (e.g meals, phone, medical records) \$50 per client
Mileage	\$ 5,100.00	\$ 5,100.00	
Staff Training & Development	\$ 2,000.00	\$ 1,000.00	Specialized training for new program staff
Indirect costs (~10%)	\$ 27,322.96	\$ 27,648.36	
Total Expenses	\$ 300,000.00	\$ 300,000.00	