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Clackamas County
www.clackamas.us

August 6, 2026

BCC Agenda Item: _____

Board of County Commissioners
Clackamas County

Approval of an Amendment to a Personal Services Contract with Mercy Housing Northwest for property management and resident case management at Mercy Greenbrae Apartments. Amendment Value is \$580,000 for 1 year. Total Agreement Value is \$1,740,000 for 3 years. Funding is through Supportive Housing Services Measure Funds. No County General Funds are involved.

Previous Board Action/Review:

- Original contract May 16, 2024 – 20240516IF7;
- Amendment #1 June 26, 2025 – 20250626 VI.F.1;
- Amendment #02 June 25, 2026 - H3S;

Performance Clackamas: Safe, Secure and Livable Communities

Counsel Review: Yes: Andrew Naylor

Procurement Review: N/A

Contact Person: Vahid Brown

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 #11558 with Mercy Housing Northwest (MHNW) for property management, resident services, and supportive housing case management at the affordable housing property of Mercy Greenbrae. This amendment extends the contract term for the new fiscal year and increases the contract value by \$580,000.00.

MHNW developed the Mercy Greenbrae affordable housing property at 3190 Furman Drive in Lake Oswego. The project comprises 100 affordable rental apartments financed through a combination of LIHTC, State, and Metro Affordable Housing Bond funds. MHNW shall provide resident services for one hundred units and supportive housing case management services for forty units.

The Resident Services and Supportive Housing Services Program will include at least 5 FTE (Resident Services Manager, Resident Services Coordinator, Case Manager, Youth Initiatives & School Liaison, and Security). The program staff will implement core programs centered on health and wellness, housing stability, community engagement, and financial well-being. Additionally, the staff will organize and coordinate all services for residents utilizing the shared community space while collecting and recording data to measure program outcomes.

RECOMMENDATION: Staff respectfully recommends that the Board of County Commissioners approve this Amendment #3 to Contract (11558) with Mercy Housing Northwest and authorize Chair Roberts or his designee to sign on behalf of Clackamas County.

Respectfully submitted,

Mary Rumbaugh

Mary Rumbaugh

Director of Health Housing and Human Services

Healthy Families. Strong Communities.

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**AMENDMENT #3
TO THE CONTRACT DOCUMENTS WITH MERCY HOUSING NORTHWEST
FOR RESIDENT SERVICES
Contract #11558**

This Amendment #3 is entered into between **Mercy Housing Northwest** (“Contractor”) and Clackamas County (“County”) and shall become part of the Contract documents entered into between both parties on **May 16, 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:

Contractor shall perform the revised Work described in, as amended in **Exhibit A to this Amendment #3**, attached hereto and incorporated by this reference herein.

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

In consideration for Contractor performing the revised Work, County may pay Contractor an amount not to exceed \$580,000.00. Consideration is 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.

The total Contract compensation shall not exceed \$1,740,000.00.

ORIGINAL CONTRACT	\$ 580,000.00
AMENDMENT # 1	\$ 580,000.00 + Term Extension
AMENDMENT # 2	\$ 0 + Term Extension
<u>AMENDMENT #3</u>	\$ 580,000.00 + Scope
TOTAL AMENDEDE CONTRACT	\$ 1,740,000.00

3. The following paragraph is added to ARTICLE II:

32. MEDIA RELEASES, PUBLIC ACKNOWLEDGMENT. The parties acknowledge the value in coordinating public communications about the Work and will make reasonable efforts to provide notice to each other prior to issuing press releases, holding press conferences, or engaging in other pre-planned media communications about the Work. Similarly, each party will make reasonable efforts to publicly recognize the other in any press releases or planned media-involved events relating to or describing the Work, including and as applicable by providing a speaking opportunity for an elected and/or county official.

{SIGNATURES ON FOLLOWING PAGE}

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.

Mercy Housing Northwest

Signed by:

Joe Thompson 7/8/2026
Authorized Signature Date

Joe Thompson
Printed Name

Clackamas County

Signature Date

Name: _____

Title: _____

Approved for Legal Sufficiency:

by 07/14/2026
County Counsel Date

EXHIBIT A
PERSONAL SERVICES CONTRACT
SCOPE OF WORK

Scope of Work: Contractor shall provide resident services for one hundred (100) units and supportive housing case management services for forty (40) units which will be restricted to households earning 30% AMI or less, and primarily meeting, but not limited to the Supportive Housing Services (SHS) Population B criteria, defined as: experiencing homelessness or having a substantial risk of experiencing homelessness, at the Mercy Greenbrae affordable housing property located at 3190 Furman Drive in Lake Oswego, OR 97034 (the "Property").

Contractor agrees to:

1. Provide a full Resident Services Program for all one hundred (100) units at the Mercy Greenbrae Property which shall include full-time Resident Services Program Staff. Resident Services includes building community, and housing stability supports with all 100 residents. This typically includes building trusting relationships with residents; connecting people to healthcare, behavioral health, income and benefits, and community-based resources; supporting crisis response and problem-solving; and offering opportunities that strengthen community, wellbeing, and housing stability. Resident services also help address barriers that may affect tenancy, such as lease compliance concerns, conflict resolution, or challenges with daily living, through a trauma-informed, person-centered approach that honors resident choice and promotes long-term housing retention, community connection, and overall quality of life.
2. Provide Supportive Housing Case Management (defined below) for forty (40) units which will be restricted to households earning 30% AMI or less and meeting the Supportive Housing Services (SHS) Population B criteria. The remaining sixty (60) units will be restricted to households earning 60% AMI or less.
3. Contractor will provide on-site Property Management and will work in partnership with County staff and SHS Program team in serving residents.
4. Measure and monitor interventions and care plans and prepare reports for HCDD Staff and the SHS Program Team.
5. Submit monthly invoices to HCDD for payment of services delivered.
6. Ensure data reporting requirements detailed in Article II, Section 30 Reporting Requirements of the Contract are met including HMIS intake, annual, and exit paperwork and data entry within timelines.

Contractor's Resident Services Program Staff must include, but is not limited to, the following positions:

- At least 1.0 FTE Resident Services Manager
- At least 1.0 FTE Resident Services Coordinator II
- At least 1.0 FTE Case Manager I
- At least 1.0 FTE Youth Initiatives and School Liaison
- At least 1.0 FTE Community Resource Navigator

Resident Services Program Staff duties will include but are not limited to:

Resident Services Manager I (RSM):

Oversees programs, staff, and services at Mercy Greenbrae in accordance with the mission and core values of Contractor and the national program model for Resident Services. This role is responsible for

supervising and supporting Contractor's staff as well as providing ongoing professional development for the team. The RSM will support the Case Manager I by taking on a caseload (10-15 on average) of residents in order to support individuals and families with greater needs.

Resident Services Coordinator II (RSC):

Facilitate and implement core programs centered on health and wellness, housing stability, community engagement, and financial wellbeing. In addition, RSCs will organize and coordinate all services for residents utilizing the shared community space while collecting and recording data to measure program outcomes. Maintain detailed knowledge of onsite services and resources offered by community partners and efficiently link individuals with needed services, including assistance in overcoming various barriers that might impede access to services. In addition to those offered onsite, build community partnerships that bring services to the property. When other services are not available, may deliver direct services.

Case Manager I (CM):

Works with residents on an individual basis with a case load of 25-30 residents in order to develop appropriate case plans, goals setting, and follow-up in order to best support residents in their housing success. Provides on-going assessment and support through resources that meet the mental, emotional, and physical needs of residents. Assists residents to utilize community resources to meet their individual needs; also works with residents to identify their skills and abilities to promote personal growth, increase income, and housing stability.

Youth Initiatives School Liaison (YISL):

Facilitate and implement core programs to create out of school time programming for youth in partnership with local schools that promotes school success (attendance, behavior, course work), grade advancement, and student empowerment. Collaborate with school personnel and community partners to focus on youth initiatives working towards well rounded development (academically & social emotional) to build stronger, more resilient communities. Collect and record data to measure program outcomes. Build community partnerships that bring services and awareness to the property; while serving as an ambassador/advocate of the property and seeking volunteers and partners.

Community Resource Navigator/ Outreach Services Coordinator:

Act as a bridge and resource for residents in regard to Resident Services programming Support residents as they navigate access to resources while supporting Resident Services staff, service providers and public agencies as they assess the needs of community members in order to utilize available resources. In addition, they will operate as an assistant to RS and community liaison to identify and locate community partners for referrals regarding work readiness programs and services.

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. Services may only be provided within the Metro jurisdictional area.

Contractor will provide long-term supportive housing services following a Housing First model, providing engagement, problem solving, internal warm hand-offs if need occurs and relocation assistance and support as needed. In its performance of these activities, Contractor will work with the Clackamas County Housing Services Team (HST), including but not limited to the Program Team that provides coordination and support to navigation, outreach and engagement, safety off the streets, and housing retention programs. Contractor will ensure that its relevant staff attend required

meetings and adhere to protocols and processes established by the Housing Services Program Team and are responsive to requests for information or other inquiries from the HST.

Referrals to SHCM will come from the By Name List (BNL) and through Coordinated Housing Access (CHA) system (see CHA referral process). When the program receives referrals, each new referral will be contacted via all known contact points within 3 to 5 business days and tracked in participant case notes.

Subject to availability of funds, as determined by the Housing Authority of Clackamas County (“HACC”) in its sole administrative discretion, HACC will pay the rental subsidy costs through the Regional Long-term Rental Assistance (RLRA) program or other applicable voucher program of participant households receiving supportive housing case management from Contractor.

The program will maintain an approximate case manager-to-household ratio of 1:25 for supportive housing case management. This ratio may vary depending on whether services are provided at a Permanent Supportive Housing (“PSH”) site or within a Resource Navigation/SHCM mixed caseload.

Case management services are dedicated to ensuring participants remain in permanent housing long-term through ongoing housing subsidy and support. Contractor must adhere to any and all HST policies/protocols. Exits should be rare and in extreme situations. Program case managers and leadership will work with HST SHCM or Housing for Success (“H4S”) program planner 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 many cases, weekly). The need for support may be more intensive once people are housed and for the first six months after. Case management may be more intensive to support people with adjusting to housing and connecting with all needed benefits and resources. Case management must be highly flexible and tailored to meet the needs of each individual. These services must include, but are not limited to:

- Identify and leverage existing individual/family strengths, expertise, and assets through a strength-based assessment.
- Work with participant to identify, develop, and maintain safe meaningful connections to their community/support network.
- Create a housing stability action plan and housing goals for each household, including wraparound services, which are collaborative between case manager and participant and focused on housing success.
- Evaluate progress related to housing action plan, as defined through collaborative process with case manager and participant, and adjust plan as needed.
- Ensure each participant has a monthly plan to pay their portion of the rent/utilities. Contractor shall refer individuals to Utility Payment Program and/or Social Security Representative Payee services if needed and eligible.
- Assist with responding to voucher/rental subsidy requirements including inspections and paperwork completion.
- Create strong relationships with landlords. Act as a landlord liaison and assist in landlord relationship development; assist participants with responding to notices from landlord.
- Provide early intervention and support to address issues that could jeopardize housing stability.
- Educate on tenant and landlord rights and responsibilities; connect participants with Housing Rights and Resources and/or Housing Mediation services as needed.
- Encourage regular communication with the tenant and property management.

- Provide problem solving and crisis management.
- Provide connection to independent living supports and/or provision of life skills training, as needed.
- Provide connections to education and employment opportunities.
- Assist (or connect to assistance) with applying for SSI/SSDI using the SSI/SSDI Outreach, Access, and Recovery (“SOAR”) model, and other mainstream benefits, when appropriate; refer to ASSIST program for SSI/SSDI application support.
- Make appropriate use of flexible client services funding to support housing stability and wellness goals.
- Assist with house cleaning and unit maintenance as needed to ensure lease compliance through approved use of flex funding.
- Coordination and connections with other supportive services as needed.
- Complete annual review.
- If participant loses their housing voucher, Contractor will look at housing first and diversion options to find other opportunities for participants whenever possible.

Please reference the Goals and Benchmarks, below, for additional program responsibilities and performance targets.

Contractual Benchmarks and Targets

Benchmarks and Timeline:

1. a Staff complete Housing First Response training. Contractors must make a good-faith effort to enroll newly hired staff in the next available training session, with completion expected no later than 12 months from hire, contingent on training availability and seat capacity. Email housingservices@clackamas.us to register for the training.
2. Direct service, outreach staff, and staff from PSH properties with openings will begin to participate (and will continue participating) in monthly in By Name List (BNL) case conferencing within 30 days of being hired.
3. Staff providing direct services and supervision should attend trainings appropriate to their program type as required by the program model and as trainings are available, i.e. Motivational Interviewing, Assertive Engagement, Fair Housing, Mental Health First Aid, Mandatory Reporting, and any other program-specific required trainings.

Contractor must meet the goals, follow the timeline, and meet each benchmark above, as indicated.

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

- First time missing a benchmark/not making progress on performance targets:
 - A monitoring meeting will be set up between the Contractor and the Contract Manager to identify barriers and possible solutions.
 - Contractor and County’s Contract Manager devise a plan with specific action steps and supports needed to address performance concerns.
- Second time missing a benchmark/not making progress on performance targets:
 - Another monitoring meeting set involving Housing Services Team (HST) leadership to discuss performance concern.
 - Issuance of a performance letter and implementation of a Performance Improvement Plan (PIP), including specific corrective actions and a clear explanation of consequences for not meeting performance standards.

- Third time missing a benchmark/not making progress on performance targets or goals set in the PIP:
 - Another monitoring meeting with HST Leadership, including an evaluation of PIP to consider all remedies, up to and including Contract termination.

HST will use Homeless Management Information System (HMIS) and training enrollment data to verify benchmark achievement. Contractor is expected to notify HST through email within 90 days (once staff are hired) if there are challenges meeting any of the benchmarks above.

HST Benchmark and Timeline responsibilities

Incorporate and adhere to the guiding principles and expectations set forth below:

1. Adhere to all applicable Fair Housing laws
2. Support Contractor in creating policy manual, as needed
3. Provide HMIS access, training, and support
4. Provide connections to CHA and Housing First Response/diversion training
5. Coordinate, support, and/or facilitate provider meetings, including case conferencing meetings, as needed
6. Provide information, access, and/or support for staff to attend professional development training
7. Connect all contracted programs with the overall system of services for people experiencing homelessness
8. Support both formal and informal partnerships between provider organizations, including those newly formed
9. 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
10. Identify unmet needs, gaps in services and system barriers and address these with the system of providers
11. Provide case staffing, either in a group of service provider peers or one-on-one, as needed
12. Assist with program access prioritization, including applying the override procedure, as needed
13. Incorporate participant voice in programming decisions
14. Maintain effective working relationships with contracted providers
15. Attend and host training and community/systems meetings
16. Collaborate in the creation of necessary program protocols and forms
17. Support Contractor in identifying and re-matching households as needed, when capacity allows and request meets transfer protocol. Transfers will happen across contracted providers.
18. Coordinate with Contractor to participate in by-name-list case conferencing meetings
19. 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 Article II, Section 30 of the Contract.
2. Work with HST to continually improve on performance targets

3. Work with the Data Team to support the administration of participant surveys and metrics reporting and support HST in any collection of information needed in support of Metro quarterly and annual reporting, as needed, such as participant success stories
4. Conduct post-program-exit follow-up assessments at 6-months post-exit
 - a. Enter the results into HMIS
5. Support administration of surveys to participants
6. 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. Work with contracted providers to continually improve on performance targets
5. Work with Contractor to identify strengths and weaknesses apparent in programming through data
6. Review and identify strengths and weaknesses from participant feedback report with Contractor
7. Monitor program for contract compliance

Contractor will be required to follow all County policies, protocols and guidelines including, but not limited to, the following:

- CHA/RLRA Referral Process
- Flexible Funding Use Guidelines
- Transfer Policy
- Non-Engagement Policy
- Housing First Policy
- RLRA Action Plan Protocol
- Progress Notes Protocol

Targets

Definition: Targets are specific and measurable outcomes by which Contractor's performance is evaluated. Not all program types are applicable to all contracts.

Outcome	Performance Targets	Data Source	Program Types
Data Completeness	95% participants entered in HMIS within 3 business days of intake, ensuring Universal Data Element (UDE) completeness.	HMIS	All
Data Accuracy	95% of changes in participant status updated in HMIS within 3 business days, including updating program entries, exits, annual review, status changes and entering case managers.	HMIS	All
Housing Stability	On avg, the amount of time from 1 st contact to program engagement will be no more than 30 days.	HMIS	Outreach
Effective Services	Make 1 st effort at contact with people referred from by name list within 5 business days.	HMIS	Outreach

	Complete CHA assessment/BNL entries of newly homeless within 3 days of engagement Contact made with at least 45% percent of target households within the first 6 months of contract 50% of participants with at least 1 contact will fully engage in services 90% of eligible service area has adequate outreach coverage	GIS Tool	
Housing First Response/Diversion	At least 10% of those referred to or seeking shelter are provided with Housing First Response to find other safe, temporary shelter or long-term options, diverting them from entering the shelter/program.	HMIS	SOS STRA
Effective Services	Non-Pod Programs: Average length of program participation below 90 days, with a goal to reduce to 45 days. Pod Programs: Average length of program participation below 365 days, with a goal to reduce to 274 days. Average time from entry to connection to housing resource within 30 days.	HMIS /Comp Site HMIS HMIS	SOS
Optimal Occupancy	Once at full program capacity, maintain at least 95% occupancy, based on stated capacity.	HMIS - See Data outcomes	SHCM RRH SOS NAV
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	Outreach SOS
Increase or maintain Income	At least 80% of households will increase or maintain income through employment and/or benefit acquisition. Agencies will need to complete annual reviews in HMIS for this to be reflected.	HMIS - Outcome tab	SHCM RRH
Ending Homelessness	At least 95% of households, housed through the program, who subsequently must leave their rental unit are relocated to a new rental unit without a break in supportive services.	HMIS, case notes	SHCM RRH
Ending Homelessness	At least 95% of households will either maintain housing within the program for at least 12 months or exit the program to a permanent housing destination.	HMIS Outcomes tab	SHCM
Ending Homelessness	At least 95% of households who exit to permanent	HMIS	SHCM STRA

	housing, remain in permanent housing as of 6-month follow-up assessment.		
System Coordination	Attend a minimum of 90% of required meetings. Program-specific staff must attend and actively engage in all relevant meetings as outlined in the Monthly HST calendar.	Virtual attendance report (ex. Zoom or Teams)/Sign-in sheets	ALL

*(NAV – Navigation, SHCM – Supportive Housing Case Management, RRH – Rapid Rehousing, SOS – Safety off the Streets, STRA – Short Term Rent Assistance)

EXHIBIT B
Budget

11558 Budget FY 26/27		
Line Item Category	Narrative/Description	Funds Requested
Project Based PSH - 400707		
Personnel		
Resident Services Manager	1 FTE	\$94,878
Resident Services Coordinator	1 FTE	\$74,914
Case Managers	1 FTE	\$76,914
Youth Initiatives & School Liaison	1 FTE	\$76,052
Security Staffing	1 FTE	\$74,404
Personnel Subtotal:		\$397,162
Program Operations - Materials and Supplies		
Program Expenses		\$53,264
Enhanced Property Management		\$60,000
Program Operations - Materials and Supplies Subtotal:		\$113,264
Client Services		
Flex Funding		\$10,000
Client Services Subtotal:		\$10,000
Indirect Administration		
Overhead/Admin	15% of salaries and fringe (personnel)	\$59,574
Total Indirect:		\$59,574
Service Component Total		\$580,000
FY 26/27 Total Budget:		\$580,000