June 5, 2025

BCC Agenda Date/Item: _____

Board of County Commissioners
Clackamas County

Approval of an Amendment to a Personal Services Contract with the Immigrant & Refugee Community Organization for homeless outreach and supportive housing case management services. Amendment Value is $572,028.48 for 1 year. Total Contract Value is $2,426,565.41 for 4 years. Funding is through Supportive Housing Services Measure funds. No County General Funds are involved.

Previous Board Action/Review	Original Contract Approved, December 01, 2022 - 20221201 1.8 Amendment #1 Approved by Department, July 31, 2023 – adding time only Amendment #2 Approved, September 7, 2023 – 230907IIIC13 Amendment #3 Approved, June 27, 2024 – 20240627 V.G.18		
Performance Clackamas	1. This funding aligns with H3S's Strategic Action 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.		
Counsel Review	Yes. Amanda Keller	**Procurement Review**	No
Contact Person	Vahid Brown, HCDD Deputy Director	**Contact Phone**	(971) 334-9870

EXECUTIVE SUMMARY: On behalf of The Housing and Community Development Division (HCDD), Health, Housing, and Human Services requests approval of Amendment #4 to contract #10876 with Immigrant & Refugee Community Organization (IRCO) for outreach, engagement, and supportive housing case management services. This amendment extends the contract term by one year and increases the value of the Contract by $572,028.48.

IRCO has provided culturally specific housing and stability services to individuals at risk of homelessness since 1994. IRCO provides culturally specific housing services in Clackamas County, focusing on Black, Indigenous, People of Color (BIPOC), and immigrant and refugee communities.

Through this Contract, IRCO provides direct mobile outreach and engagement services to assist households in locating and securing permanent housing by helping them overcome barriers to housing. They also provide households with ongoing supportive housing case management to be paired with rent assistance voucher programs such as the Regional Long-term Rent Assistance Program. Supportive housing case

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management is often the missing piece that can lead to greater housing stability when added to rent assistance programs.

Amendment #4 adds $572,028.48 in Supportive Housing Services funds to provide ongoing services from IRCO for an additional year.

RECOMMENDATION: Staff respectfully request that the Board of County Commissioners approve Amendment #4 to the Contract (10876) 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

AMENDMENT # 4
TO THE CONTRACT DOCUMENTS WITH IMMIGRANT AND REFUGEE COMMUNITY ORGANIZATION
Contract #10876

This Amendment #4 is entered into between **Immigrant and Refugee Community Organization** ("Contractor") and Clackamas County ("County") and shall become part of the Contract documents entered into between both parties on **December 01, 2022** ("Contract").

The Purpose of this Amendment #4 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 termination date is hereby changed from June 30, 2025 to June 30, 2026.

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

During the extended term of the Contract, Contractor shall perform the Work, as amended in **Exhibit A to this Amendment #4**, 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 during the extended term of this Contract, County will pay Contractor an amount not to exceed $572,028.48. Consideration is on a reimbursement basis in accordance with the budget as set forth in Exhibit B to this Amendment #4, attached hereto and incorporated by this reference herein, and the terms and conditions of the Contract. The total Contract compensation will not exceed $2,426,565.41.

ORIGINAL CONTRACT	**$ 727,140.99**
AMENDMENT #1	**$ 0 + Term Extension**
AMENDMENT #2	**$ 555,367.46 + Term Extension**
AMENDMENT #3	**$ 572,028.48 + Term Extension**
AMENDMENT #4	**$ 572,028.48 + Scope**
TOTAL AMENDED CONTRACT	**$ 2,426,565.41**

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

Immigrant And Refugee Community Organization

Signed by:

Jihane Nami   5/8/2025

—FAC98721F35A4EE...

Authorized Signature   Date

Jihane Nami

Printed Name

Clackamas County

_____
Signature   Date

Name: _____

Title:_____

Approved as to Form:

_____ 5/11/2025
County Counsel   Date

EXHIBIT
A Scope of Work

Outreach and Engagement Program Design

Contractor will provide supportive services through site-based and mobile outreach and engagement to people entering their designated location using their array of basic need services. Contractor's direct outreach methods will incorporate the provision of safety on the street's 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", connections to shelter, housing navigation, and rental assistance resources.

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

All referrals for Outreach and Engagement will come from ongoing community interaction, Coordinated Housing Access (CHA), street outreach programs, and through coordination with HST staff and the by name list (BNL). Outreach must be prioritized for the people with the highest safety and health vulnerabilities (and their household members). The contractor will work with the HST to establish and/or approve prioritization policies. These services will be restricted to within the Metro jurisdictional boundary.

A full-time (1.0 FTE) outreach worker is expected to have approximately 780 outreach interactions per year, which averages to about 65 interactions per month. These interactions may include both brief contacts and full engagements, and can occur with both new and previously engaged individuals.
Of the total annual interactions:
- Approximately 390 interactions (or 33 per month) should involve full engagement, such as assessments, follow-up, navigating resources, or housing navigation support. This is a program entry
- Approximately 390 interactions (or 33 per month) may be brief contacts, focused on rapport-building, information sharing, or basic support. This is a service transaction

Some individuals may be counted in both categories, depending on the depth of the interaction. Outreach should account for approximately 60% of the staff member's time, with the remaining 40% dedicated to administrative duties, documentation, team meetings, and professional development.

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) outreach efforts, and collecting information for the Built for Zero initiative are required as an outreach and engagement 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. Contractor will provide HST with information regarding the days and times during which their outreach services will be readily available.

Contractor must provide connections to housing navigation and supportive housing case management services, rental assistance resources, complete CHA screening, and all required Homeless Management Information System (HMIS) data entry. Services offered by Contractor must be voluntary for participants

and must be based on participants' stated needs and preferences. However, contractor may set policies and expectations for participants to follow when accessing outreach and engagement services. Reference available HST guidance and procedures for non-engagement of individuals, coverage, safety, and partnerships. When exit to a housing resource is not an option, please connect individual to other safety on the street's resources if available.

Contractor will communicate in a timely manner to HST and engage participants any changes in operations or schedule that may affect the previously established days and times when their services will be available to the community.

Services offered must include, but are not limited to:
- Provision of safety on the streets resources (e.g., food, survival gear, toiletries)
- Assistance in identification and removal of barriers to permanent housing placement
- Completion of CHA assessment as soon as possible upon engagement
- Information about and assistance in connecting to mainstream services and benefits (e.g., SNAP, Oregon Health Plan enrollment, behavioral health day centers, food pantries)
- Build trusting relationships with participants
- Housing First Aid/diversion: All people will be offered Housing First Aid or rapid resolution conversation
- Assistance obtaining appropriate documents to access housing, employment, and other needed services, with consideration for the needs of immigrant/vulnerable populations.
- Individualized resource referral and connection, including mental and physical health, as needed.
- Outreach, including to pre-identified people on by-name list, with the goal of connecting to longer-term housing resources and/or shelter.
- If participant is unable to engage semi-independently, support timely transition to higher level of care or long-term residential treatment programs.
- 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:
- Utilize a trauma informed approach, including techniques outlined in the Guiding Principles and Expectations below.
- Actively participate in training, coordination, case conferencing and other meetings as required by HST. Including participation in city/community outreach meetings within service area.
- Maintain active communication with HST Program Planner, including but not limited to ongoing communications regarding best practices, HST program policies, information tracking, and participant trends or issues.
- Target highly visible or heavily used service sites for outreach or as assigned by HST
- Document and certify eligibility of each adult household member as either Population A or Population B, in accordance with Exhibit F.
- Outreach and Engagement may not categorically exclude persons fleeing domestic violence.
- 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.
- All uses of flexible funds for client services must adhere to the Clackamas County Supportive Housing Services Flexible Funding Use Guidelines.

Outreach and Engagement Goals and Benchmarks

Outcome	Goal	Data Source
Data Completeness	95% of data quality across all HMIS data elements within 10 business days of contact	HMIS

Data Accuracy	95% of changes in participant status updated in HMIS within 10 days, including updating program entries, exits, annual review, status changes and entering case managers	HMIS
Housing Stability	On avg, the amount of time from 1st contact to program engagement will no more than 30 days.	HMIS
Effective Services	Make 1st effort at contact with people referred from by name list within an avg of 5 business days. Complete CHA assessment/BNL entries of newly homeless within 3 days of engagement Contact made with at least XX households within the 1st 12 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	HMIS GIS Tool
Ending Homelessness	At least 75% of households enter to a permanent or transitional (more than 90 day stay) housing option after engaging with contractor services.	HMIS
System Coordination	Attend 90% percent of meetings. Program specific staff will attend and engage in relevant/required meetings. See Monthly HST calendar for guidance.	Virtual attendance report (ex. Zoom or Teams app) /Sign in sheets

Benchmarks and Timeline:
1. Hire 100% of staff within 90 days of Amendment #4
2. Complete HMIS training for at least one staff member within 90 days of Amendment #4
3. All program staff to complete Housing First Aid/Diversion training within 180 days of Amendment #4
4. Submit contractor program manual and grievance policy within 180 days of Amendment #4. Grievance policy must be provided to all clients at intake and as requested.
5. Staff complete RLRA training and attend an RLRA Orientation within 30 days of being hired
6. Staff will participate in BNL Case Conferencing within 30 days of being hired
7. Staff providing support/case management should attend trainings appropriate to their program type as required by the program model. I.e. Motivational Interviewing, Assertive Engagement, Fair Housing, Mental Health First Aid, Mandatory Reporting.

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

      o   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, as needed
4. Provide HMIS access, training, and support
5. Provide connections to CHA and Housing First Aid/diversion training
6. Coordinate, support, and/or facilitate provider meetings, including case conferencing meetings, as needed
7. Provide information, access, and/or support for staff to attend Equity, Inclusion and continuing education trainings
8. Connect all contracted programs with the overall system of services for people experiencing homelessness
9. Support both formal and informal partnerships between provider organizations, including those newly formed
10. 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
11. Identify unmet needs, gaps in services and system barriers and address these with the system of providers
12. Provide case staffing, either in a group of service provider peers or one-on-one, as needed
13. Assist with program access prioritization, as needed
14. Incorporate participant voice in programming decisions
15. Maintain effective working relationships with contracted providers
16. Attend training and community/systems meetings
17. Provide or assist with creation of necessary participant/program forms
18. 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.
19. Coordinate with Contractor to participate in by-name-list case conferencing meetings
20. 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. Conduct post-program-exit follow-up assessments at 6-month post-exit
   a. Enter the results into HMIS
4. Prepare an annual participant feedback report
5. Submit to monitoring for contract compliance
6. Staff Survey Data: County may require Contractor to cooperate with County, Metro, and/or and independent professional survey firm in the administration of a staff survey to collect anonymized information, including but not limited to staff demographics, classification, compensation, accessibility practices, and overall satisfaction and experiences. Staff participation in the survey shall by optional, and confidential of individual-level responses shall be preserved.

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 for contract compliance

Contractor will be required to follow all County policies including, but not limited to, the following:
- CHA/RLRA Referral Process
- Flexible Funding Use Guidelines
- Graduation Protocol
- Transfer Policy
- Non-Engagement Policy
- Housing First Policy
- RLRA Action Plan Policy
- Progress Notes Policy

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. 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. Case managers will assist with housing navigation and placement as needed.

Subject to availability of funds, as determined by Clackamas County's Housing Services Team (HST) in its sole administrative discretion, <u>HACC will pay the rental subsidy costs</u> 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.

The program will assist no less than 25 households with supportive housing case management. The expected case manager to participant ratio is approx. 1:25. As more participants are added to the case load, more staff must be added 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). Case management must by highly flexible and tailored to meet the needs of each individual. These services must include, but are not limited to:
    o Identify and leverage existing individual/family strengths, expertise, and assets through a strength-based assessment
    o 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.
    o Evaluate progress, as defined by the participant, and adjust plan as needed
    o Ensure each participant has a monthly plan to pay their portion of the rent/utilities; money management support
    o Assistance responding to RLRA requirements including inspections and paperwork completion
    o Act as a landlord contact and assist in landlord relationship development
    o Education on tenant and landlord rights and responsibilities
    o Regular communication with the tenant and property management
    o Early intervention and support to address issues that could jeopardize housing stability
    o Problem solving and crisis management
    o Connection to independent living supports and/or provision of life skills training, as needed
    o Connections to education and employment opportunities
    o Assistance (or connections to assistance) with applying for SSI/SSDI using the SOAR model, and other mainstream benefits, when appropriate.
    o Appropriate use of flexible funding to support housing stability and wellness goals
    o Assistance with house cleaning and unit maintenance as needed to ensure lease compliance
    o Coordination and connections with other supportive services as needed
    o Plan to "graduate" from housing subsidy and/or intensive housing case management services, as appropriate using "Move 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 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
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. 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 meeting 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 trainings
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 Article II, Section 31 of the contract.
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 households served
          ii. Bed/Unit utilization
          iii. Rates of increased income and benefits
          iv. Rates of Permanent Housing
              1. Maintenance of housing in program
              2. Exits to other permanent housing
              3. Relocations within program to another PH unit
              4. Post-exit follow-up PH retention rates
          v. Average cost per household served annually
      e. Narrative responses to questions
          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
8. Staff Survey Data: County may require Contractor to cooperate with County, Metro, and/or and independent professional survey firm in the administration of a staff survey to collect anonymized information, including but not limited to staff demographics, classification, compensation, accessibility practices, and overall satisfaction and experiences. Staff participation in the survey shall by optional, and confidential of individual-level responses shall be preserved.

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

Resource Navigation Program Design

Contractor shall provide a Resource Navigation program, which will include Housing Problem Solving (HPS) services to assist households in exploring possible housing options and community supports using

a strengths-based approach. Resource Navigators will provide resource navigation and housing placement.

Housing Problem Solving (HPS)

Housing Problem Solving (HPS) is a strengths-based, person-centered approach designed to assist households in resolving their immediate housing crises. It focuses on creative, individualized solutions that prioritize client choice, leveraging existing resources, support networks, and minimal financial assistance when needed. HPS aims to quickly identify safe, viable housing options outside of the formal homeless response system, reducing the need for long-term interventions.

Resource Navigator Core Responsibilities

1. Housing Problem Solving Services:

   o The contractor will facilitate HPS conversations with households and provide light-touch resources (e.g., flex funds and community supports) to help resolve housing crises.
   o The contractor will support the housing placement process following a Housing First model, including engagement, problem-solving, internal warm hand-offs as needed, and relocation assistance.

2. Collaboration with Clackamas County Housing Services Team (HST):

   o The contractor will work with the HST Program Team, including staff supporting navigation, outreach, safety off the streets, and housing retention programs.
   o Contractors are required to attend weekly community resource meetings facilitated by the Navigation Program Planner to stay updated on available resources and receive additional support with case conferencing.
   o Relevant staff must attend required meetings, adhere to HST protocols and processes, and respond to requests for information or inquiries from HST within two business days.

Resource Navigation Referral Process

- Referrals for Resource Navigation will come from the By-Name List (BNL) through CHA.
   o Referrals to culturally specific providers will prioritize alignment with their culturally specific service offerings.
- Each FTE will assist no less than 60 households with Resource Navigation annually
- Clients will be enrolled into the resource navigation program and engaged in housing problem solving.
- It is expected that skilled HPS interventions will exit at least 30% of referrals into permanent housing. When a higher level of care is necessary resource navigator will add clear notes in HMIS outlining housing problem solving attempts and ensure CHA assessment reflects accurate information. This will ensure participant is on the BNL (by-name list) to be matched with a long-term voucher.
- Contractors will ensure that participants are exited from CHA program entries in HMIS as needed, with updated notes for efficient system coordination.

Program Timelines

Voucher-Matched Clients (when vouchers are available):
- Individuals enrolled in the navigation program and matched with a voucher must secure housing placement within 120 days.
- Extensions may be approved by the voucher program manager of the Housing Authority of Clackamas County or their designee.

Non-Voucher-Matched Clients:

- When possible, participants are expected to be rapidly exited from homelessness within 60 days. If participant needs a higher level of care than contractor can provide, program entry should be exited within 60 days, with service transactions and notes updated.
- In some circumstances, program entries may remain open for up to 90 days, but this must be decided in coordination with the Navigation Program Planner at Clackamas County.
- If a program entry is expected to remain open beyond 90 days, there must be a clearly documented reason in HMIS. Such instances should be rare and require prior approval from Clackamas County.

Contact Requirements

1. Initial Outreach:

   - Contact participants within three business days of receiving a referral.
   - If unreachable by phone, navigators must use other contact methods listed in HMIS.

2. Escalation Process:

   - If contact cannot be established, the contractor must collaborate with Clackamas County's outreach program planner and other case conferencing platforms to attempt contact.
   - If no contact can be made, a note will be added in HMIS, and the participant will be exited from CHA assessment (Provider #4433).

3. In-Person Housing Problem Solving Conversations:

   - Navigators will meet participants in-person to explore housing options using HPS techniques, including:

     - Active listening.
     - Strengths exploration.
     - Identifying supports and resources.
     - Creating actionable next steps.
     - Utilizing flex funds for housing solutions if appropriate.
   - Navigators are expected to stay informed about recovery-based housing and treatment resources to connect participants with needed services.

     - Clackamas County will provide regular meetings for providers to learn about updated resources and problem solving at least once a week. Community of Practice will be developed through this process.

Capacity and Caseload Management

- The program will maintain a navigator-to-participant ratio of 1:10 at all times.
- The contractor must report revolving capacity monthly to the HST Navigation Program Planner.

Performance Monitoring

1. Quarterly Reviews:

- o County housing services staff will review service provider caseloads and benchmarks quarterly for Housing Navigation/Placement and Supportive Housing Case Management.
- o Budget adjustments may be made to shift staff and costs between services without altering the total contract value. Budget adjustments must be requested in writing to the Housing Services team using housingservices@clackamas.us,

2. Engagement and Contact Efforts:

- o Navigators must maintain contact with 100% of participants, checking in at least weekly. If unreachable, this should be addressed in case conferencing and inactive policy applied.
- o Multiple engagement efforts, including email, phone calls, text messages, and in-person outreach, must be documented in HMIS.

3. Case Conferencing:

- o Navigators must utilize HST open office hours and BNL case conferencing to problem-solve contact barriers and coordinate participant services.

Housing Navigation and Placement Goals

- Flexible services and funding will be used to assist households in accessing and securing rental housing tailored to their specific needs as quickly as possible.
- Agencies will work collaboratively with HST, community groups, and other housing organizations to creatively address client housing needs.

Housing navigation and placement must include the following:

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

Housing Navigation & Placement Program Goals and Benchmarks:

Outcome	Goal	Data Source
Data Completeness	95% of participants entered in HMIS within 3 business days of intake	HMIS
Data Accuracy	95% of changes in participant status updated in HMIS within 10 days, including updating program entries, exits, annual review, status changes and entering case managers	HMIS

Housing Navigation	Permanently house at least 30% of households within 60 days of initial contact. Connect 95% of households with community resources. Update 95% of HMIS profiles with notes, service transactions and appropriate exits from programs within 3 business days	HMIS
Capacity	Maintain 90% capacity at all times starting 90 days post contract execution.	HMIS and Capacity Tracker
System Coordination	Attend 90% percent of meetings. Program specific staff will attend and engage in relevant/required meetings. See Monthly HST calendar for guidance.	Zoom Attendance Report and Sign-In Sheets

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

1. Hire 100% of staff within 90 days of Contract execution.
2. Complete HMIS training for at least one staff member within 14 days of Contract execution.
3. All program staff to complete Housing First Response/Diversion training within 180 days of Contract execution.
4. Submit contractor program manual and grievance policy within 180 days of Contract execution. Grievance policy must be provided to all clients at intake and as requested.
5. Staff will participate in BNL Case Conferencing within 30 days of being hired.
6. Staff providing support/case management should attend trainings appropriate to their program. type as required by the program model. I.e. Motivational Interviewing, Assertive Engagement, Fair Housing, Mental Health First Response, Mandatory Reporting.

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
  o Monitoring meeting with HST to identify barriers and possible solutions
- Second time missing a benchmark/not making progress on goals
  o 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
  o 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, as needed.

4. Provide HMIS access, training, and support
5. Provide connections to CHA and Housing First Response/diversion training.
6. Coordinate, support, and/or facilitate provider meetings, including case conferencing meetings, as needed.
7. Provide information, access, and/or support for staff to attend Equity, Inclusion and continuing education trainings.
8. Connect all contracted programs with the overall system of services for people experiencing homelessness.
9. Support both formal and informal partnerships between provider organizations, including those newly formed.
10. 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
11. Identify unmet needs, gaps in services and system barriers and address these with the system of providers.
12. Provide case staffing, either in a group of service provider peers or one-on-one, as needed.
13. Assist with program access prioritization, as needed.
14. Incorporate participant voice in programming decisions.
15. Maintain effective working relationships with contracted providers.
16. Attend training and community/systems meetings.
17. Provide or assist with creation of necessary participant/program forms.
18. 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.
19. Coordinate with Contractor to participate in by-name-list case conferencing meetings.
20. 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 31 of the Contract.
2. Work with HST to continually improve on performance targets.
3. Conduct post-program-exit follow-up assessments at 6-month post-exit
   a. Enter the results into HMIS.
4. Prepare an annual participant feedback report.
5. Submit to monitoring for contract compliance.
6. Staff Survey Data: County may require Contractor to cooperate with County, Metro, and/or and independent professional survey firm in the administration of a staff survey to collect anonymized information, including but not limited to staff demographics, classification, compensation, accessibility practices, and overall satisfaction and experiences. Staff participation in the survey shall be optional, and confidential of individual-level responses shall be preserved.

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 for contract compliance.

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

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

Exhibit

B Budget

Line Item Category	Narrative/Description	Funds Requested
Budget		
Outreach and Engagement		
Personnel		
Program Director	.02 FTE at $88,500* per year + payroll and benefits costs estimated at 48%	$2,619.60
Program Manager	.075 FTE at $85,000* per year + payroll and benefits costs estimated at 48%	$10,555.00
Program Coordinator	.25 FTE at $60,000 per year + payroll and benefits costs estimated at 48%	$21,080.00
Bilingual/Bicultural Mobile Housing Outreach and Engagement	1 FTE at $55,000 per year + payroll and benefits costs estimated at 48%	$81,400.00
	Personnel Subtotal:	**$115,654.60**
Program Operations - Materials and Supplies		
Professional Services	Background checks for staff at $85.	$85.00
Translation	Translation and Interpretation	$200.00
Printing	Cost of printing program materials at 300 copies per month at $.10 per page x 12 months	$200.00
Phone	Cell phone at $200 per phone + 180 per year per phone + 333/year/FTE connectivity costs	$826.22
Space	Office Space rental at a location TBD	$3,500.00
Supplies	Office supplies, program activity/instructional supplies, curriculum materials, laptop replacement as needed	$1,000.00
Education/Training	Professional Development (e.g. Trauma Informed Care)	$687.00
Meetings	Staff Meeting and Retreat Expenses	$400.00
Mileage/Travel	Mileage for program related travel; reimbursed at $.70 per mile x 1 FTE staff x 170 miles/mo.	$1,428.00
Insurance	at $167/FTE per year	$369.84
IT Maintenance Costs	General IT Connectivity, Maintenance, & Support costs at	$670.00
Postage	Cost of postage for program mailings	$69.85
	Program Operations - Materials and Supplies Subtotal:	**$9,435.91**
Client Services		
Recruitment Activities	Refreshments and other costs for outreach activities	$765.34
Client Assistance	Client Assistance costs such as food boxes, clothing, tuition/registration fees, etc.	$13,000.00
	Client Services Subtotal:	**$13,765.34**
Indirect Administration		
Indirect Administration	at 13.6%	$18,884.00
	Indirect Subtotal:	**$18,884.00**
	Outreach and Engagement Subtotal:	**$157,739.85**
Supportive Housing Case Management		
Personnel		
Program Director	.025 FTE at $88,500* per year + payroll and benefits costs estimated at 42%	$3,141.75
Program Manager	.1 FTE at $85,000* per year + payroll and benefits costs estimated at 42%	$12,070.00
Program Coordinator	.25 FTE at 60,000 per year + payroll and benefits costs estimated at 42%	$21,300.00

Bilingual/Bicultural Housing Case Management	1 FTE at $55,000 per year + payroll and benefits costs estimated at 42%	$78,100.00
	Personnel Subtotal:	**$114,611.75**
Program Operations - Materials and Supplies		
Professional Services	Background checks for staff at $85.	$200.00
Translation	Translation and Interpretation	$190.00
Printing	Cost of printing program materials at 400 copies per month at $.10 per page x 12 months	$480.00
Phone	Cell phone at $200 per phone + 180 per year per phone + 333/year/FTE connectivity costs	$837.88
Space	Office Space rental at a location TBD	$3,500.00
Supplies	Office supplies, program activity/instructional supplies, curriculum materials, laptop replacement as needed	$1,412.00
Education/Training	Professional Development (e.g. Trauma Informed Care)	$973.00
Meetings	Staff Meeting and Retreat Expenses	$400.00
Mileage/Travel	Mileage for program related travel; reimbursed at $.70 per mile x 1 FTE staff x 200 miles/mo.	$1,680.00
Insurance	at $167/FTE per year	$379.50
IT Maintenance Costs	General IT Connectivity, Maintenance, & Support costs at	$687.50
Postage	Cost of postage for program mailings	$70.14
	Program Operations - Materials and Supplies Subtotal:	**$10,810.01**
Client Services		
Client Assistance	Client Assistance costs such as food boxes, clothing, tuition/registration fees, etc.	$52,600.00
	Client Services Subtotal:	**$52,600.00**
Indirect Administration		
Indirect Administration	at 13.6%	$24,211.00
	Indirect Subtotal:	**$24,211.00**
	Supportive Housing Case Management Subtotal:	**$202,232.76**
Resource Navigation		
Personnel		
Program Director	.03 FTE at $88,500* per year + payroll and benefits costs estimated at 33%	$3,531.15
Program Manager	.13 FTE at $85,000* per year + payroll and benefits costs estimated at 33%	$11,305.00
Program Coordinator	.25 FTE at 60,000 per year + payroll and benefits costs estimated at 33%	$19,950.00
Housing Navigator	1 FTE at $55,000 per year + payroll and benefits costs estimated at 33%	$73,150.00
	Personnel Subtotal:	**$107,936.15**
Program Operations - Materials and Supplies		
Professional Services	Background checks for staff at $85.	$85.00
Translation	Translation and Interpretation	$750.00
Printing	Cost of printing program materials at 400 copies per month at $.10 per page x 12 months	$480.00
Phone	Cell phone at $200 per phone + 180 per year per phone + 333/year/FTE connectivity costs	$849.53
Space	Office Space rental at a location TBD	$4,000.00
Supplies	Office supplies, program activity/instructional supplies, curriculum materials, laptop replacement as needed	$2,844.16
Education/Training	Professional Development (e.g. Trauma Informed Care)	$2,500.00
Meetings	Staff Meeting and Retreat Expenses	$800.00
Mileage/Travel	Mileage for program related travel; reimbursed at $.70 per mile x 150 miles/mo.	$1,260.00
Insurance	at $167/FTE per year	$389.16

IT Maintenance Costs	General IT Connectivity, Maintenance, & Support costs at	$705.00
Postage	Cost of postage for program mailings	$69.87
Program Operations - Materials and Supplies Subtotal:		**$14,732.72**
Client Services		
Client Assistance	Client Assistance costs such as food boxes, clothing, tuition/registration fees, etc.	$64,000.00
Client Services Subtotal:		**$64,000.00**
Indirect Administration		
Indirect Administration	at 13.6%	$25,387.00
Indirect Subtotal:		**$25,387.00**
Resource Navigation Subtotal:		**$212,055.87**
Total Budget:		**$572,028.48**