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Щоб попросити переклад або спеціальні послуги для осіб з особливими потребами, зверніться до нас, скориставшись такими контактними даними: **h3s-directoroffice@clackamas.us | 503-655-5697.**

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Để yêu cầu dịch vụ dịch thuật hoặc điều chỉnh liên quan đến tình trạng khuyết tật, vui lòng liên hệ với chúng tôi qua **h3s-directoroffice@clackamas.us | 503-655-5697.**



Clackamas County
www.clackamas.us

May 7th, 2027

BCC Agenda Item: _____

Board of County Commissioners
Clackamas County

Approval of a Personal Services Contract with Health Management Associates to conduct an organizational assessment and fiscal sustainability analysis. Agreement Value is \$249,500 for 2 years. Funding is through \$124,750 of Interest Income and \$124,750 of Budgeted County General Funds.

Previous Board Action/Review: No previous board action

Performance Clackamas: Public Trust in Good Government,
Healthy People

Counsel Review: Yes – Amanda Keller

Procurement Review: Yes

Contact Person: Kathryn Sofich

Contact Phone: 971-378-0045

EXECUTIVE SUMMARY:

As part of H3S's Strategic Action Plan, Health, Housing and Human Services (H3S) is contracting with Health Management Associates to conduct an organizational assessment and fiscal sustainability analysis of H3S.

The goals of this assessment are:

1. Modernize the department's organizational and internal systems for effective, efficient, and resilient services.
2. Foster financial sustainability and strength through the development of a financial analysis and evaluation of potential revenue sources.
3. Align programmatic work across divisions to ensure equitable delivery of services.

Due to ongoing budget uncertainties at the federal, state and county levels, H3S needs to become more proactive and nimbler in anticipating and responding to future budget fluctuations while meeting the most pressing needs of Clackamas County residents. We want to identify and implement changes in operations or programming to be able to better respond to the changing funding landscapes and identify cost savings measures as we build future budgets.

Healthy Families. Strong Communities.

2051 Kaen Road, Oregon City, OR 97045 • Phone (503) 650-5697 • Fax (503) 655-8677

www.clackamas.us

The assessment will result in a revised administrative services framework and a program delivery structure to be recommended in the summer and fall of 2027 with implementation planning and support through June 2028.

RECOMMENDATION: Staff respectfully request that the Board of County Commissioners approve this contract, 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



**CLACKAMAS COUNTY
PERSONAL SERVICES CONTRACT
Contract #0000001714**

This Personal Services Contract (this “Contract”) is entered into between Health Management Associates, Inc. (“Contractor”), and Clackamas County, a political subdivision of the State of Oregon (“County”), acting by and through its Department of Health, Housing, and Human Services.

ARTICLE I.

- 1. Effective Date and Duration.** This Contract shall become effective upon the signature of both parties. Unless earlier terminated or extended, this Contract shall expire on June 30, 2028.
- 2. Scope of Work.** Contractor shall provide the following services: Organizational Assessment and Fiscal Sustainability Analysis (RFP 2025-89) (“Work”), further described in **Exhibit A.**
- 3. Consideration.** The County agrees to pay Contractor, from available and authorized funds, a sum not to exceed two hundred forty-nine thousand and five hundred dollars (\$249,500.00) for accomplishing the Work required by this Contract. Consideration rates are on a time and materials basis in accordance with the rates and costs specified in Exhibit B. If any interim payments to Contractor are made, such payments shall be made only in accordance with the schedule and requirements in Exhibit B.
- 4. Invoices and Payments.** Unless otherwise specified, Contractor shall submit monthly invoices for Work performed. Invoices shall describe all Work performed with particularity, by whom it was performed, and shall itemize and explain all expenses for which reimbursement is claimed. The invoices shall include the total amount billed to date by Contractor prior to the current invoice. If Contractor fails to present invoices in proper form within sixty (60) calendar days after the end of the month in which the services were rendered, Contractor waives any rights to present such invoice thereafter and to receive payment therefor. Payments shall be made in accordance with ORS 293.462 to Contractor following the County’s review and approval of invoices submitted by Contractor. Contractor shall not submit invoices for, and the County will not be obligated to pay, any amount in excess of the maximum compensation amount set forth above. If this maximum compensation amount is increased by amendment of this Contract, the amendment must be fully effective before Contractor performs Work subject to the amendment.

Invoices shall reference the above Contract Number and be submitted to:

H3S-DirectorsOffice@clackamas.us

- 5. Travel and Other Expense.** Authorized: Yes No
If travel expense reimbursement is authorized in this Contract, such expense shall only be reimbursed at the rates in the County Contractor Travel Reimbursement Policy, hereby incorporated by reference and found at: <https://www.clackamas.us/finance/terms.html>. Travel expense reimbursement is not in excess of the not to exceed consideration.
- 6. Contract Documents.** This Contract consists of the following documents, which are listed in descending order of precedence and are attached and incorporated by reference, this Contract, Exhibit A, and Exhibit B. Unless explicitly agreed to by the parties in this Contract, any additional terms and conditions that may be contained in Exhibit A are void.

7. Contractor and County Contacts.

| | |
|---|--|
| Contractor Administrator: Kelly Johnson Phone: 517-482-9236 Email: contracts@healthmanagement.com | County Administrator: Kathryn Sofich Phone: 503-650-5697; 971-378-0045 Email: ksofich@clackamas.us |
|---|--|

Payment information will be reported to the Internal Revenue Service (“IRS”) under the name and taxpayer ID number submitted. (See I.R.S. 1099 for additional instructions regarding taxpayer ID numbers.) Information not matching IRS records will subject Contractor payments to backup withholding.

ARTICLE II.

- 1. Access to Records.** Contractor shall maintain books, records, documents, and other evidence, in accordance with generally accepted accounting procedures and practices, sufficient to reflect properly all costs of whatever nature claimed to have been incurred and anticipated to be incurred in the performance of this Contract. County and their duly authorized representatives shall have access to the books, documents, papers, and records of Contractor, which are directly pertinent to this Contract for the purpose of making audit, examination, excerpts, and transcripts. Contractor shall maintain such books and records for a minimum of six (6) years, or such longer period as may be required by applicable law, following final payment and termination of this Contract, or until the conclusion of any audit, controversy or litigation arising out of or related to this Contract, whichever date is later.
- 2. Availability of Future Funds.** Any continuation or extension of this Contract after the end of the fiscal period in which it is written is contingent on a new appropriation for each succeeding fiscal period sufficient to continue to make payments under this Contract, as determined by the County in its sole administrative discretion.
- 3. Captions.** The captions or headings in this Contract are for convenience only and in no way define, limit, or describe the scope or intent of any provisions of this Contract.
- 4. Compliance with Applicable Law.** Contractor shall comply with all applicable federal, state and local laws, regulations, executive orders, and ordinances, as such may be amended from time to time.
- 5. Counterparts.** This Contract may be executed in several counterparts (electronic or otherwise), each of which shall be an original, all of which shall constitute the same instrument.
- 6. Governing Law.** This Contract, and all rights, obligations, and disputes arising out of it, shall be governed and construed in accordance with the laws of the State of Oregon and the ordinances of Clackamas County without regard to principles of conflicts of law. Any claim, action, or suit between County and Contractor that arises out of or relates to the performance of this Contract shall be brought and conducted solely and exclusively within the Circuit Court for Clackamas County, for the State of Oregon. Provided, however, that if any such claim, action, or suit may be brought in a federal forum, it shall be brought and conducted solely and exclusively within the United States District Court for the District of Oregon. In no event shall this section be construed as a waiver by the County of any form of defense or immunity, whether sovereign immunity, governmental immunity, immunity based on the Eleventh Amendment to the Constitution of the United States or otherwise, from any claim or from the jurisdiction of any court. Contractor, by execution of this Contract, hereby consents to the personal jurisdiction of the courts referenced in this section.
- 7. Indemnity, Responsibility for Damages.** Contractor shall be responsible for all damage to property, injury to persons, and loss, expense, inconvenience, and delay which may be caused by, or result from, any act, omission, or neglect of Contractor, its subcontractors, agents, or employees. The

Contractor agrees to indemnify and defend the County, and its officers, elected officials, agents, and employees, from and against all claims, actions, losses, liabilities, including reasonable attorney and accounting fees, and all expenses incidental to the investigation and defense thereof, arising out of or based upon Contractor's acts or omissions in performing under this Contract.

However, neither Contractor nor any attorney engaged by Contractor shall defend the claim in the name of County, purport to act as legal representative of County, or settle any claim on behalf of County, without the approval of the Clackamas County Counsel's Office. County may assume its own defense and settlement at its election and expense.

8. Independent Contractor Status. The service(s) to be rendered under this Contract are those of an independent contractor. Although the County reserves the right to determine (and modify) the delivery schedule for the Work to be performed and to evaluate the quality of the completed performance, County cannot and will not control the means or manner of Contractor's performance. Contractor is responsible for determining the appropriate means and manner of performing the Work. Contractor is not to be considered an agent or employee of County for any purpose, including, but not limited to: (A) The Contractor will be solely responsible for payment of any Federal or State taxes required as a result of this Contract; and (B) This Contract is not intended to entitle the Contractor to any benefits generally granted to County employees, including, but not limited to, vacation, holiday and sick leave, other leaves with pay, tenure, medical and dental coverage, life and disability insurance, overtime, Social Security, Workers' Compensation, unemployment compensation, or retirement benefits.

9. Insurance. Contractor shall secure at its own expense and keep in effect during the term of the performance under this Contract the insurance required and minimum coverage indicated below. The insurance requirement outlined below do not in any way limit the amount of scope of liability of Contractor under this Contract. Contractor shall provide proof of said insurance and name the County as an additional insured on all required liability policies. Proof of insurance and notice of any material change should be submitted to the following address: Clackamas County Procurement Division, 2051 Kaen Road, Oregon City, OR 97045 or emailed to the County Contract Analyst.

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|---|
| Required - Workers Compensation: Contractor shall comply with the statutory workers' compensation requirements in ORS 656.017, unless exempt under ORS 656.027 or 656.126. |
| <input checked="" type="checkbox"/> Required – Commercial General Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per occurrence, with an annual aggregate limit of \$2,000,000 for Bodily Injury and Property Damage. |
| <input checked="" type="checkbox"/> Required – Professional Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per claim, with an annual aggregate limit of \$2,000,000 for damages caused by error, omission or negligent acts. |
| <input checked="" type="checkbox"/> Required – Automobile Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per accident for Bodily Injury and Property Damage. |

The policy(s) shall be primary insurance as respects to the County. Any insurance or self-insurance maintained by the County shall be excess and shall not contribute to it. Any obligation that County agree to a waiver of subrogation is hereby stricken.

- 10. Limitation of Liabilities.** This Contract is expressly subject to the debt limitation of Oregon counties set forth in Article XI, Section 10, of the Oregon Constitution, and is contingent upon funds being appropriated therefore. Any provisions herein which would conflict with law are deemed inoperative to that extent. Except for liability arising under or related to Article II, Section 13 or Section 20 neither party shall be liable for (i) any indirect, incidental, consequential or special damages under this Contract or (ii) any damages of any sort arising solely from the termination of this Contract in accordance with its terms.
- 11. Notices.** Except as otherwise provided in this Contract, any required notices between the parties shall be given in writing by personal delivery, email, or mailing the same, to the Contract Administrators identified in Article 1, Section 6. If notice is sent to County, a copy shall also be sent to: Clackamas County Procurement, 2051 Kaen Road, Oregon City, OR 97045. Any communication or notice so addressed and mailed shall be deemed to be given five (5) days after mailing, and immediately upon personal delivery, or within 2 hours after the email is sent during County's normal business hours (Monday – Thursday, 7:00 a.m. to 6:00 p.m.) (as recorded on the device from which the sender sent the email), unless the sender receives an automated message or other indication that the email has not been delivered.
- 12. Ownership of Work Product.** All work product of Contractor that results from this Contract (the "Work Product") is the exclusive property of County. County and Contractor intend that such Work Product be deemed "work made for hire" of which County shall be deemed the author. If for any reason the Work Product is not deemed "work made for hire," Contractor hereby irrevocably assigns to County all of its right, title, and interest in and to any and all of the Work Product, whether arising from copyright, patent, trademark or trade secret, or any other state or federal intellectual property law or doctrine. Contractor shall execute such further documents and instruments as County may reasonably request in order to fully vest such rights in County. Contractor forever waives any and all rights relating to the Work Product, including without limitation, any and all rights arising under 17 USC § 106A or any other rights of identification of authorship or rights of approval, restriction or limitation on use or subsequent modifications. Notwithstanding the above, County shall have no rights in any pre-existing Contractor intellectual property provided to County by Contractor in the performance of this Contract except to copy, use and re-use any such Contractor intellectual property for County use only.
- 13. Representations and Warranties.** Contractor represents and warrants to County that (A) Contractor has the power and authority to enter into and perform this Contract; (B) this Contract, when executed and delivered, shall be a valid and binding obligation of Contractor enforceable in accordance with its terms; (C) Contractor shall at all times during the term of this Contract, be qualified, professionally competent, and duly licensed to perform the Work; (D) Contractor is an independent contractor as defined in ORS 670.600; and (E) the Work under this Contract shall be performed in a good and workmanlike manner and in accordance with the highest professional standards. The warranties set forth in this section are in addition to, and not in lieu of, any other warranties provided.
- 14. Survival.** All rights and obligations shall cease upon termination or expiration of this Contract, except for the rights and obligations set forth in Article II, Sections 1, 6, 7, 10, 12, 13, 14, 15, 17, 20, 21, 25, 27, 28, 32, 33, and 34, and all other rights and obligations which by their context are intended to survive. However, such expiration shall not extinguish or prejudice the County's right to enforce this Contract with respect to: (a) any breach of a Contractor warranty; or (b) any default or defect in Contractor performance that has not been cured.
- 15. Severability.** If any term or provision of this Contract is declared by a court of competent jurisdiction to be illegal or in conflict with any law, the validity of the remaining terms and provisions shall not be affected, and the rights and obligations of the parties shall be construed and enforced as if the Contract did not contain the particular term or provision held to be invalid.

16. Subcontracts and Assignments. Contractor shall not enter into any subcontracts for any of the Work required by this Contract, or assign or transfer any of its interest in this Contract by operation of law or otherwise, without obtaining prior written approval from the County, which shall be granted or denied in the County's sole discretion. In addition to any provisions the County may require, Contractor shall include in any permitted subcontract under this Contract a requirement that the subcontractor be bound by this Article II, Sections 1, 7, 8, 13, 16 and 27 as if the subcontractor were the Contractor. County's consent to any subcontract shall not relieve Contractor of any of its duties or obligations under this Contract.

17. Successors in Interest. The provisions of this Contract shall be binding upon and shall inure to the benefit of the parties hereto, and their respective authorized successors and assigns.

18. Tax Compliance Certification. The Contractor shall comply with all federal, state and local laws, regulation, executive orders and ordinances applicable to this Contract. Contractor represents and warrants that it has complied, and will continue to comply throughout the duration of this Contract and any extensions, with all tax laws of this state or any political subdivision of this state, including but not limited to ORS 305.620 and ORS chapters 316, 317, and 318. Any violation of this section shall constitute a material breach of this Contract and shall entitle County to terminate this Contract, to pursue and recover any and all damages that arise from the breach and the termination of this Contract, and to pursue any or all of the remedies available under this Contract or applicable law.

19. Termination. This Contract may be terminated for the following reasons: (A) by mutual agreement of the parties or by the County (i) for convenience upon thirty (30) days written notice to Contractor, or (ii) at any time the County fails to receive funding, appropriations, or other expenditure authority as solely determined by the County; or (B) if Contractor breaches any Contract provision or is declared insolvent, County may terminate after thirty (30) days written notice with an opportunity to cure.

Upon receipt of written notice of termination from the County, Contractor shall immediately stop performance of the Work. Upon termination of this Contract, Contractor shall deliver to County all documents, Work Product, information, works-in-progress and other property that are or would be deliverables had the Contract Work been completed. Upon County's request, Contractor shall surrender to anyone County designates, all documents, research, objects or other tangible things needed to complete the Work.

20. Remedies. If terminated by the County due to a breach by the Contractor, then the County shall have any remedy available to it in law or equity. If this Contract is terminated for any other reason, Contractor's sole remedy is payment for the goods and services delivered and accepted by the County, less any setoff to which the County is entitled.

21. No Third Party Beneficiaries. County and Contractor are the only parties to this Contract and are the only parties entitled to enforce its terms. Nothing in this Contract gives, is intended to give, or shall be construed to give or provide any benefit or right, whether directly, indirectly or otherwise, to third persons unless such third persons are individually identified by name herein and expressly described as intended beneficiaries of the terms of this Contract.

22. Time is of the Essence. Contractor agrees that time is of the essence in the performance of this Contract.

23. Foreign Contractor. If the Contractor is not domiciled in or registered to do business in the State of Oregon, Contractor shall promptly provide to the Oregon Department of Revenue and the Secretary of State, Corporate Division, all information required by those agencies relative to this Contract. The

Contractor shall demonstrate its legal capacity to perform these services in the State of Oregon prior to entering into this Contract.

- 24. Force Majeure.** Neither County nor Contractor shall be held responsible for delay or default caused by events outside the County or Contractor's reasonable control including, but not limited to, fire, terrorism, riot, acts of God, or war. However, Contractor shall make all reasonable efforts to remove or eliminate such a cause of delay or default and shall upon the cessation of the cause, diligently pursue performance of its obligations under this Contract.
- 25. Waiver.** The failure of County to enforce any provision of this Contract shall not constitute a waiver by County of that or any other provision.
- 26. Public Contracting Requirements.** Pursuant to the public contracting requirements contained in Oregon Revised Statutes ("ORS") Chapter 279B.220 through 279B.235, Contractor shall:
- a. Make payments promptly, as due, to all persons supplying to Contractor labor or materials for the prosecution of the work provided for in the Contract.
 - b. Pay all contributions or amounts due the Industrial Accident Fund from such Contractor or subcontractor incurred in the performance of the Contract.
 - c. Not permit any lien or claim to be filed or prosecuted against County on account of any labor or material furnished.
 - d. Pay the Department of Revenue all sums withheld from employees pursuant to ORS 316.167.
 - e. As applicable, the Contractor shall pay employees for work in accordance with ORS 279B.235, which is incorporated herein by this reference. The Contractor shall comply with the prohibitions set forth in ORS 652.220, compliance of which is a material element of this Contract, and failure to comply is a breach entitling County to terminate this Contract for cause.
 - f. If the Work involves lawn and landscape maintenance, Contractor shall salvage, recycle, compost, or mulch yard waste material at an approved site, if feasible and cost effective.
- 27. No Attorney Fees.** In the event any arbitration, action or proceeding, including any bankruptcy proceeding, is instituted to enforce any term of this Contract, each party shall be responsible for its own attorneys' fees and expenses.
- 28. Confidentiality.** Contractor acknowledges that it and its employees and agents may, in the course of performing their obligations under this Contract, be exposed to or acquire information that the County desires or is required to maintain as confidential, including information that is protected under applicable law, including Personal Information (as "**Personal Information**" is defined in ORS 646A.602(12)).

Contractor agrees to hold any and all information that it is required by law or that the County marks as "Confidential" to be held in confidence ("**Confidential Information**"), using at least the same degree of care that Contractor uses in maintaining the confidentiality of its own confidential information, and will use the Confidential Information for no purpose other than in the performance of this Contract, and to advise each of its employees and agents of their obligations to keep Confidential Information confidential.

Contractor agrees that, except as directed by the County, Contractor will not at any time during or after the term of this Contract, disclose, directly or indirectly, any Confidential Information to any person, and that upon termination or expiration of this Contract or the County's request, Contractor will turn over to the County all documents, papers, records and other materials in Contractor's possession which embody Confidential Information.

Contractor acknowledges that breach of this Contract, including disclosure of any Confidential Information, or disclosure of other information that, at law or in good conscience or equity, ought to remain confidential, will give rise to irreparable injury to the County that cannot adequately be compensated in damages. Accordingly, the County may seek and obtain injunctive relief against the breach or threatened breach of the foregoing undertakings, in addition to any other legal remedies that may be available. Contractor acknowledges and agrees that the covenants contained herein are necessary for the protection of the legitimate business interests of the County and are reasonable in scope and content.

Contractor agrees to comply with all reasonable requests by the County to ensure the confidentiality and nondisclosure of the Confidential Information, including if requested and without limitation: (a) obtaining nondisclosure agreements, in a form approved by the County, from each of Contractor's employees and agents who are performing services, and providing copies of such agreements to the County; and (b) performing criminal background checks on each of Contractor's employees and agents who are performing services, and providing a copy of the results to the County.

Contractor shall report, either orally or in writing, to the County any use or disclosure of Confidential Information not authorized by this Contract or in writing by the County, including any reasonable belief that an unauthorized individual has accessed Confidential Information. Contractor shall make the report to the County immediately upon discovery of the unauthorized disclosure, but in no event more than two (2) business days after Contractor reasonably believes there has been such unauthorized use or disclosure. Contractor's report shall identify: (i) the nature of the unauthorized use or disclosure, (ii) the Confidential Information used or disclosed, (iii) who made the unauthorized use or received the unauthorized disclosure, (iv) what Contractor has done or shall do to mitigate any deleterious effect of the unauthorized use or disclosure, and (v) what corrective action Contractor has taken or shall take to prevent future similar unauthorized use or disclosure. Contractor shall provide such other information, including a written report, as reasonably requested by the County.

Notwithstanding any other provision in this Contract, Contractor will be responsible for all damages, fines and corrective action (including credit monitoring services) arising from disclosure of such Confidential Information caused by a breach of its data security or the confidentiality provisions hereunder.

The provisions in this Section shall operate in addition to, and not as limitation of, the confidentiality and similar requirements set forth in the rest of the Contract, as it may otherwise be amended. Contractor's obligations under this Contract shall survive the expiration or termination of the Contract, as amended, and shall be perpetual.

29. Reserved.

30. Key Persons. Contractor acknowledges and agrees that a significant reason the County is entering into this Contract is because of the special qualifications of certain Key Persons set forth in the contract. Under this Contract, the County is engaging the expertise, experience, judgment, and personal attention of such Key Persons. Neither Contractor nor any of the Key Persons shall delegate performance of the management powers and responsibilities each such Key Person is required to provide under this Contract to any other employee or agent of the Contractor unless the County provides prior written consent to such delegation. Contractor shall not reassign or transfer a Key Person to other duties or positions such that the Key Person is no longer available to provide the County with such Key Person's services unless the County provides prior written consent to such reassignment or transfer.

31. Reserved.

32. Reserved.

33. Reserved.

34. **Merger.** THIS CONTRACT CONSTITUTES THE ENTIRE AGREEMENT BETWEEN THE PARTIES WITH RESPECT TO THE SUBJECT MATTER REFERENCED THEREIN. THERE ARE NO UNDERSTANDINGS, AGREEMENTS, OR REPRESENTATIONS, ORAL OR WRITTEN, NOT SPECIFIED HEREIN REGARDING THIS CONTRACT. NO AMENDMENT, CONSENT, OR WAIVER OF TERMS OF THIS CONTRACT SHALL BIND EITHER PARTY UNLESS IN WRITING AND SIGNED BY ALL PARTIES. ANY SUCH AMENDMENT, CONSENT, OR WAIVER SHALL BE EFFECTIVE ONLY IN THE SPECIFIC INSTANCE AND FOR THE SPECIFIC PURPOSE GIVEN. CONTRACTOR, BY THE SIGNATURE HERETO OF ITS AUTHORIZED REPRESENTATIVE, IS AN INDEPENDENT CONTRACTOR, ACKNOWLEDGES HAVING READ AND UNDERSTOOD THIS CONTRACT, AND CONTRACTOR AGREES TO BE BOUND BY ITS TERMS AND CONDITIONS.

By their signatures below, the parties to this Contract agree to the terms, conditions, and content expressed herein.

Health Management Associates, Inc.

Clackamas County

Signed by: Frank Ingiosi April 17, 2026
Authorized Signature Date
Frank Ingiosi

Signature Date

Name / Title (Printed)

Name: _____

967736-93

Title: _____

Oregon Business Registry #

Approved for Legal Sufficiency:

FBC/Michigan
Entity Type / State of Formation

Amanda Kelly 4/20/2026
County Counsel Date

EXHIBIT A

RFP #2025-89

**ORGANIZATIONAL ASSESSMENT AND FISCAL SUSTAINABILITY ANALYSIS
PUBLISHED JANUARY 8, 2026**



REQUEST FOR PROPOSALS #2025-89

FOR

ORGANIZATIONAL ASSESSMENT AND FISCAL SUSTAINABILITY ANALYSIS

BOARD OF COUNTY COMMISSIONERS

CRAIG ROBERTS, Chair
PAUL SAVAS, Commissioner
MARTHA SCHRADER, Commissioner
BEN WEST, Commissioner
DIANA HELM, Commissioner

Gary Schmidt
County Administrator

Ryan Rice
Contract Analyst

PROPOSAL CLOSING DATE, TIME AND LOCATION

DATE: February 12, 2026

TIME: 2:00 PM, Pacific Time

PLACE: <https://bidlocker.us/a/clackamascounty/BidLocker>

SCHEDULE

| | |
|---|--|
| Request for Proposals Issued..... | January 8, 2026 |
| Protest of Specifications Deadline..... | January 15, 2026, 5:00 PM, Pacific Time |
| Deadline to Submit Clarifying Questions..... | February 5, 2026, 5:00 PM, Pacific Time |
| Request for Proposals Closing Date and Time.... | February 12, 2026, 2:00 PM, Pacific Time |
| Deadline to Submit Protest of Award..... | Seven (7) days from the Intent to Award |

TABLE OF CONTENTS

| |
|---|
| Section 1 – Notice of Request for Proposals |
| Section 2 – Instructions to Proposers |
| Section 3 – Scope of Work |
| Section 4 – Evaluation and Selection Criteria |
| Section 5 – Proposal Content (Including Proposal Certification) |

SECTION 1 NOTICE OF REQUEST FOR PROPOSALS

Notice is hereby given that Clackamas County, through its Board of County Commissioners, will receive sealed Proposals per specifications until **2:00 PM, February 12, 2026** (“Closing”), to provide an Organizational Assessment and Fiscal Sustainability Analysis. No Proposals will be received or considered after that time.

Location of RFP documents: OregonBuys

RFP Documents can be downloaded from the state of Oregon procurement website (“OregonBuys”) at the following address <https://oregonbuys.gov/bsv/view/login/login.xhtml>, Document No. S-C01010-00015676.

Prospective Proposers will need to sign in to download the information and that information will be accumulated for a Plan Holder's List. Prospective Proposers are responsible for obtaining any Addenda, clarifying questions, and Notices of Award from OregonBuys.

Submitting Proposals: Bid Locker

Proposals will only be accepted electronically thru a secure online bid submission service, **Bid Locker**. *Email submissions to Clackamas County email addresses will no longer be accepted.*

- A. Completed proposal documents must arrive electronically via Bid Locker located at <https://bidlocker.us/a/clackamascounty/BidLocker>.
- B. Bid Locker will electronically document the date and time of all submissions. Completed documents must arrive by the deadline indicated in Section 1 or as modified by Addendum. **LATE PROPOSALS WILL NOT BE ACCEPTED.**
- C. Proposers must register and create a profile for their business with Bid Locker in order to submit for this project. It is free to register for Bid Locker.
- D. Proposers with further questions concerning Bid Locker may review the Vendor’s Guide located at <https://www.clackamas.us/how-to-bid-on-county-projects>.

Contact Information

Procurement Process and Technical Questions: Ryan Rice, rrice@clackamas.us

The Board of County Commissioners reserves the right to reject any and all Proposals not in compliance with all prescribed public bidding procedures and requirements, and may reject for good cause any and all Proposals upon the finding that it is in the public interest to do so and to waive any and all informalities in the public interest. In the award of the contract, the Board of County Commissioners will consider the element of time, will accept the Proposal or Proposals which in their estimation will best serve the interests of Clackamas County and will reserve the right to award the contract to the contractor whose Proposal shall be best for the public good.

Clackamas County encourages proposals from Minority, Women, Veteran and Emerging Small Businesses.

SECTION 2 INSTRUCTIONS TO PROPOSERS

Clackamas County (“County”) reserves the right to reject any and all Proposals received as a result of this RFP. County Local Contract Review Board Rules (“LCRB”) govern the procurement process for the County.

2.1 Modification or Withdrawal of Proposal: Any Proposal may be modified or withdrawn at any time prior to the Closing deadline, provided that a written request is received by the County Procurement Division Director, prior to the Closing. The withdrawal of a Proposal will not prejudice the right of a Proposer to submit a new Proposal.

2.2 Requests for Clarification and Requests for Change: Proposers may submit questions regarding the specifications of the RFP. Questions must be received in writing on or before 5:00 p.m. (Pacific Time), on the date indicated in the Schedule, at the Procurement Division address as listed in Section 1 of this RFP. Requests for changes must include the reason for the change and any proposed changes to the requirements. The purpose of this requirement is to permit County to correct, prior to the opening of Proposals, RFP terms or technical requirements that may be unlawful, improvident or which unjustifiably restrict competition. County will consider all requested changes and, if appropriate, amend the RFP. No oral or written instructions or information concerning this RFP from County managers, employees or agents to prospective Proposers shall bind County unless included in an Addendum to the RFP.

2.3 Protests of the RFP/Specifications: Protests must be in accordance with LCRB C-047-0730. Protests of Specifications must be received in writing on or before 5:00 p.m. (Pacific Time), on the date indicated in the Schedule, or within three (3) business days of issuance of any addendum, at the Procurement Division address listed in Section 1 of this RFP. Protests may not be faxed. Protests of the RFP specifications must include the reason for the protest and any proposed changes to the requirements.

2.4 Addenda: If any part of this RFP is changed, an addendum will be provided to Proposers that have provided an address to the Procurement Division for this procurement. It shall be Proposers responsibility to regularly check OregonBuys for any notices, published addenda, or response to clarifying questions.

2.5 Submission of Proposals: Proposals must be submitted in accordance with Section 5. All Proposals shall be legibly written in ink or typed and comply in all regards with the requirements of this RFP. Proposals that include orders or qualifications may be rejected as irregular. All Proposals must include a signature that affirms the Proposer’s intent to be bound by the Proposal (may be on cover letter, on the Proposal, or the Proposal Certification Form) shall be signed. If a Proposal is submitted by a firm or partnership, the name and address of the firm or partnership shall be shown, together with the names and addresses of the members. If the Proposal is submitted by a corporation, it shall be signed in the name of such corporation by an official who is authorized to bind the contractor. The Proposals will be considered by the County to be submitted in confidence and are not subject to public disclosure until the notice of intent to award has been issued.

No late Proposals will be accepted. Proposals submitted after the Closing will be considered late and will be returned unopened. Proposals may not be submitted by telephone or fax.

2.6 Post-Selection Review and Protest of Award: County will name the apparent successful Proposer in a Notice of Intent to Award published on OregonBuys. Identification of the apparent successful Proposer is procedural only and creates no right of the named Proposer to award of the contract. Competing Proposers shall be given seven (7) calendar days from the date on the Notice of Intent to Award to review the file at the Procurement Division office and file a written protest of award, pursuant to LCRB C-047-0740. Any award protest must be in writing and must be delivered by email, hand-delivery or mail to the address for the Procurement Division as listed in Section 1 of this RFP.

Only actual Proposers may protest if they believe they have been adversely affected because the Proposer would be eligible to be awarded the contract in the event the protest is successful. The basis of the written protest must be in accordance with ORS 279B.410 and shall specify the grounds upon which the protest is based. In order to be an adversely affected Proposer with a right to submit a written protest, a Proposer must be next in line for

award, i.e. the protester must claim that all higher rated Proposers are ineligible for award because they are non-responsive or non-responsible.

County will consider any protests received and:

- a. reject all protests and proceed with final evaluation of, and any allowed contract language negotiation with, the apparent successful Proposer and, pending the satisfactory outcome of this final evaluation and negotiation, enter into a contract with the named Proposer; OR
- b. sustain a meritorious protest(s) and reject the apparent successful Proposer as nonresponsive, if such Proposer is unable to demonstrate that its Proposal complied with all material requirements of the solicitation and Oregon public procurement law; thereafter, County may name a new apparent successful Proposer; OR
- c. reject all Proposals and cancel the procurement.

2.7 Acceptance of Contractual Requirements: Failure of the selected Proposer to execute a contract and deliver required insurance certificates within ten (10) calendar days after notification of an award may result in cancellation of the award. This time period may be extended at the option of County.

2.8 Public Records: Proposals are deemed confidential until the “Notice of Intent to Award” letter is issued. This RFP and one copy of each original Proposal received in response to it, together with copies of all documents pertaining to the award of a contract, will be kept and made a part of a file or record which will be open to public inspection. If a Proposal contains any information that is considered a **TRADE SECRET** under ORS 192.345(2), **SUCH INFORMATION MUST BE LISTED ON A SEPARATE SHEET CAPABLE OF SEPARATION FROM THE REMAINING PROPOSAL AND MUST BE CLEARLY MARKED WITH THE FOLLOWING LEGEND:**

“This information constitutes a trade secret under ORS 192.345(2), and shall not be disclosed except in accordance with the Oregon Public Records Law, ORS Chapter 192.”

The Oregon Public Records Law exempts from disclosure only bona fide trade secrets, and the exemption from disclosure applies only “unless the public interest requires disclosure in the particular instance” (ORS 192.345). Therefore, non-disclosure of documents, or any portion of a document submitted as part of a Proposal, may depend upon official or judicial determinations made pursuant to the Public Records Law.

2.9 Investigation of References: County reserves the right to investigate all references in addition to those supplied references and investigate past performance of any Proposer with respect to its successful performance of similar services, its compliance with specifications and contractual obligations, its completion or delivery of a project on schedule, its lawful payment of subcontractors and workers, and any other factor relevant to this RFP. County may postpone the award or the execution of the contract after the announcement of the apparent successful Proposer in order to complete its investigation.

2.10 RFP Proposal Preparation Costs and Other Costs: Proposer costs of developing the Proposal, cost of attendance at an interview (if requested by County), or any other costs are entirely the responsibility of the Proposer, and will not be reimbursed in any manner by County.

2.11 Clarification and Clarity: County reserves the right to seek clarification of each Proposal, or to make an award without further discussion of Proposals received. Therefore, it is important that each Proposal be submitted initially in the most complete, clear, and favorable manner possible.

2.12 Right to Reject Proposals: County reserves the right to reject any or all Proposals or to withdraw any item from the award, if such rejection or withdrawal would be in the public interest, as determined by County.

2.13 Cancellation: County reserves the right to cancel or postpone this RFP at any time or to award no contract.

2.14 Proposal Terms: All Proposals, including any price quotations, will be valid and firm through a period of one hundred and eighty (180) calendar days following the Closing date. County may require an

extension of this firm offer period. Proposers will be required to agree to the longer time frame in order to be further considered in the procurement process.

2.15 Oral Presentations: At County's sole option, Proposers may be required to give an oral presentation of their Proposals to County, a process which would provide an opportunity for the Proposer to clarify or elaborate on the Proposal but will in no material way change Proposer's original Proposal. If the evaluating committee requests presentations, the Procurement Division will schedule the time and location for said presentation. Any costs of participating in such presentations will be borne solely by Proposer and will not be reimbursed by County. **Note:** Oral presentations are at the discretion of the evaluating committee and may not be conducted; therefore, **written Proposals should be complete.**

2.16 Usage: It is the intention of County to utilize the services of the successful Proposer(s) to provide services as outlined in the below Scope of Work.

2.17 Review for Responsiveness: Upon receipt of all Proposals, the Procurement Division or designee will determine the responsiveness of all Proposals before submitting them to the evaluation committee. If a Proposal is incomplete or non-responsive in significant part or in whole, it will be rejected and will not be submitted to the evaluation committee. County reserves the right to determine if an inadvertent error is solely clerical or is a minor informality which may be waived, and then to determine if an error is grounds for disqualifying a Proposal. The Proposer's contact person identified on the Proposal will be notified, identifying the reason(s) the Proposal is non-responsive. One copy of the Proposal will be archived and all others discarded.

2.18 RFP Incorporated into Contract: This RFP will become part of the Contract between County and the selected contractor(s). The contractor(s) will be bound to perform according to the terms of this RFP, their Proposal(s), and the terms of the Sample Contract.

2.19 Communication Blackout Period: Except as called for in this RFP, Proposers may not communicate with members of the Evaluation Committee or other County employees or representatives about the RFP during the procurement process until the apparent successful Proposer is selected, and all protests, if any, have been resolved. Communication in violation of this restriction may result in rejection of a Proposer.

2.20 Prohibition on Commissions and Subcontractors: County will contract directly with persons/entities capable of performing the requirements of this RFP. Contractors must be represented directly. Participation by brokers or commissioned agents will not be allowed during the Proposal process. Contractor shall not use subcontractors to perform the Work unless specifically pre-authorized in writing to do so by the County. Contractor represents that any employees assigned to perform the Work, and any authorized subcontractors performing the Work, are fully qualified to perform the tasks assigned to them, and shall perform the Work in a competent and professional manner. Contractor shall not be permitted to add on any fee or charge for subcontractor Work. Contractor shall provide, if requested, any documents relating to subcontractor's qualifications to perform required Work.

2.21 Ownership of Proposals: All Proposals in response to this RFP are the sole property of County, and subject to the provisions of ORS 192.410-192.505 (Public Records Act).

2.22 Clerical Errors in Awards: County reserves the right to correct inaccurate awards resulting from its clerical errors.

2.23 Rejection of Qualified Proposals: Proposals may be rejected in whole or in part if they attempt to limit or modify any of the terms, conditions, or specifications of the RFP or the Sample Contract.

2.24 Collusion: By responding, the Proposer states that the Proposal is not made in connection with any competing Proposer submitting a separate response to the RFP, and is in all aspects fair and without collusion or fraud. Proposer also certifies that no officer, agent, elected official, or employee of County has a pecuniary interest in this Proposal.

2.25 Evaluation Committee: Proposals will be evaluated by a committee consisting of representatives from County and potentially external representatives. County reserves the right to modify the Evaluation Committee make-up in its sole discretion.

2.26 Commencement of Work: The contractor shall commence no work until all insurance requirements have been met, the Protest of Awards deadline has been passed, any protest have been decided, a contract has been fully executed, and a Notice to Proceed has been issued by County.

2.27 Best and Final Offer: County may request best and final offers from those Proposers determined by County to be reasonably viable for contract award. However, County reserves the right to award a contract on the basis of initial Proposal received. Therefore, each Proposal should contain the Proposer's best terms from a price and technical standpoint. Following evaluation of the best and final offers, County may select for final contract negotiations/execution the offers that are most advantageous to County, considering cost and the evaluation criteria in this RFP.

2.28 Nondiscrimination: The successful Proposer agrees that, in performing the work called for by this RFP and in securing and supplying materials, contractor will not discriminate against any person on the basis of race, color, religious creed, political ideas, sex, age, marital status, sexual orientation, gender identity, veteran status, physical or mental handicap, national origin or ancestry, or any other class protected by applicable law.

2.29 Intergovernmental Cooperative Procurement Statement: Pursuant to ORS 279A and LCRB, other public agencies shall have the ability to purchase the awarded goods and services from the awarded contractor(s) under terms and conditions of the resultant contract. Any such purchases shall be between the contractor and the participating public agency and shall not impact the contractor's obligation to the County. Any estimated purchase volumes listed herein do not include other public agencies and County makes no guarantee as to their participation. Any Proposer, by written notification included with their Proposal, may decline to extend the prices and terms of this solicitation to any and/or all other public agencies. County grants to any and all public serving governmental agencies, authorization to purchase equivalent services or products described herein at the same submitted unit bid price, but only with the consent of the contractor awarded the contract by the County.

SECTION 3 SCOPE OF WORK

3.1. INTRODUCTION

The Clackamas County Health Housing and Human Services (“H3S”) Department is seeking proposals from vendors to conduct a comprehensive organizational and fiscal sustainability assessment of H3S. This will include an assessment of the department’s organizational structure of programs and financial health. It will result in recommendations and an implementation plan that will create a fiscally sound, coordinated and aligned equity-driven department. The goal is to identify alternatives for organizing and funding H3S operations in order for the department to provide efficient and cost-effective services for the community and to support critical capital improvement projects (i.e. Recovery Campus).

Goals:

1. Modernize the department’s organizational and internal systems for effective, efficient, and resilient services.
2. Foster financial sustainability and strength through the development of a financial analysis and evaluation of potential revenue sources.
3. Align programmatic work across divisions to ensure equitable delivery of services.

The Department has entered a challenging fiscal environment due to limited revenues, statewide increases in the Public Employee Retirement System (“PERS”) premiums, and a shifting state and federal funding environment that has put pressure on contingencies and unappropriated ending fund balance percentages.

Please direct all Technical/Specifications or Procurement Process Questions to the indicated representative referenced in the Notice of Request for Proposals and note the communication restriction outlined in Section 2.19.

3.2 BACKGROUND

H3S includes six (6) divisions and currently employs over 800 people with an operating budget of \$406 million. The department’s mission is to lead and learn with equity in serving individuals, families, and communities by providing access to high-quality healthcare, housing, and services that strengthen social and economic resilience. The six H3S divisions are:

- Behavioral Health
- Children, Family and Community Connections
- Health Centers
- Housing and Community Development
- Public Health
- Social Services

In addition to these divisions, the H3S Director’s Office provides strategic direction for the department, guidance on the overall department program and budget priorities, and infrastructure support for operating divisions.

The department created its first-ever Strategic Action Plan (“SAP”) in 2024. This plan includes a vision and mission to guide our work and three goal areas to provide a roadmap for implementation. One of the driving factors to develop the SAP was to build a foundation to come together as one department and not six separate divisions. The plan has served as an entry point to examine how we can improve organizational effectiveness and share resources across divisions to better serve the communities in Clackamas County.

Specifically, the SAP includes 3 broad goals that focus on increasing collaboration and partnership across divisions to improve our programs and services, as well as reviewing the organizational and business practices for efficiencies. The 3 goals are:

- *Goal 1: Empowered and Thriving Staff* focuses on improving department-wide communication, developing ways to increase staff engagement, developing a department-wide onboarding plan, and working to ensure staff have the resources to promote a sense of safety and belonging.
- *Goal 2: Equity Driven Services* includes strategies and objectives that focus on developing a partnership plan, developing a comprehensive department-wide equity framework, and improving and increasing culturally responsive and accessible services and materials.
- *Goal 3: Organizational Excellence and Continuous Quality Improvement* includes strategies and objectives that focus on standardizing business services systems across the department, exploring the feasibility of a closed-loop referral system, and developing change management principles and resources as programs and divisions approach changes or look to launch initiatives.

H3S is also guided by the County's Board of Commissioners' overarching priorities, which are:

- Safe, Secure, and Livable Communities
- Vibrant Economy
- Strong Infrastructure
- Healthy People
- Public Trust in Good Government

H3S leadership recognizes its responsibility to assess the health of the organization, provide direction with priority setting, and make changes as needed. We have already experienced a first round of budget reductions. In October 2025, H3S had to make budget adjustments in three divisions resulting in a reduction of 27 full time employees and services provided to County residents and expect to see further reductions in the next fiscal year.

Due to ongoing budget uncertainties, H3S also needs to become more responsive and nimble to respond to future budget fluctuations while meeting the most pressing needs of Clackamas County residents. We want to identify and implement changes in operations and/or programming to be able to better respond to the changing funding landscapes and identify cost savings measures as we build future budgets.

Given the limited resources of the County, shifting state and federal funding landscape, and future needs of the County that could include significant capital investments (Recovery Campus), it is critical for H3S to provide services in the most efficient and cost-effective manner. Highly qualified proposals will demonstrate the ability to use proven methodologies and provide creative, strategic solutions that will have a lasting impact.

Some work has begun through our SAP to standardize operations, identify specific opportunities to increase collaboration and coordination, and identify opportunities to align the work among the different divisions. However, given the current and future budget landscape, the need to examine how we do our work and how we are organized to do that work warrants a closer examination and analysis.

Currently, divisions have begun looking closely at how they operate. This organizational assessment will allow us to leverage the work that is currently happening within those divisions and look holistically at how we need to be organized at a department level. The FY 26-27 budget process has begun, which also presents an opportunity to align this assessment with future budgets. Lastly, county internal service partners (HR, Finance) work with us as if we operate as one department but we currently do not have universally adopted operating procedures across our department. In an effort to meet their needs, it is

incumbent upon us to identify where we can improve and update our protocols, processes, and practices to ensure we are responding as one department.

3.3. SCOPE OF WORK

H3S is issuing this Request for Proposals (“RFP”) to contract with an independent third-party that specializes in organizational development and financial analysis. Clackamas County Health, Housing and Human Services invites interested and qualified vendors, hereafter referred to as “Contractor,” to submit bids that fulfill the scope of work and schedule of this RFP.

Clackamas County Health, Housing and Human Services is seeking a qualified contractor to conduct a comprehensive organizational and financial assessment that could include:

1. Analyze organizational and financial structure, which will include:
 - a. Examine the structure and scope of work of each division, including the Director’s Office, with attention to how the structure aligns with current and emerging community needs and anticipated and unanticipated changes in funding sources.
 - b. Review the various funding streams and identify how they impact the departments’ overall ability to establish financial sustainability.
 - c. Review functions that are delivered in each division versus department-wide and assess whether consolidation or shared services would strengthen financial stability and/or operational efficiency.
 - d. Examine what services we provide versus contracting out to community-based organizations and how best to leverage community strengths while maintaining accountability for outcomes.
 - e. Examine how the organization should be positioned to best serve the needs of the community and future leaders 5 years from now.
 - f. Identify the strengths and areas for improvement of our department.
 - g. Identify best practices from comparable municipalities for benchmarking the organizational and financial structures.
2. Present recommendations and facilitate a decision-making process for H3S leadership on how H3S should structure its operational and programmatic functions to build long-term financial resilience and service alignment with community needs. Recommendations should consider:
 - a. Opportunities for H3S to operate more efficiently, such as by reducing redundancies.
 - b. What functions should stay at the division level versus be moved to the department level.
 - c. What services should be contracted out and/or no longer provided.
 - d. Whether the current division structure should be changed.
 - e. Identify opportunities for divisions and programs to find increased alignment in the services and supports delivered.
 - f. The desired culture of H3S is one that promotes belonging and empowerment.
 - g. Apply equity decision-making principles to recommended changes to organizational and funding structure to analyze impact.
3. Facilitate the development of an implementation plan that integrates change management principles and tools and a trauma-informed approach.
 - a. Determine a timeline for proposed changes and employee engagement opportunities.
 - b. Identify the impact these changes will have on different stakeholders.
 - c. Provide a framework for evaluating progress.

The contractor will lead the assessment, analyze findings, and make recommendations that ensure an organizational and financial structure that is best aligned to the mission and the business of H3S for now and the near future.

A range of methods should be considered that include conducting interviews from a range of stakeholders, which could include focus groups, virtual, and in-person. The contractor may convene a

multi-disciplinary workgroup comprised of H3S staff to provide input on the development and implementation of the data collection elements.

Throughout the process, department and division staff will serve as key collaborators, providing insight into how programs have been historically structured and funded, how community and fiscal conditions are shifting, and what internal changes would be most practical and sustainable. The selected contractor will incorporate this expertise and ensure leadership engagement throughout the analysis and recommendation phases.

The following draft timeline assumes a contract is executed and notice to proceed is issued by March 2026.

The contractor will employ a phased approach that recognizes the County’s fiscal calendar and the need for early decision-making. A preliminary organizational and funding framework will be delivered by October 2026 to inform FY 27–28 budget adjustments, with full implementation of changes to administrative functions targeted for July 2027. The subsequent phase will focus on program-level reorganization aligned with the County’s health, housing, and human services theory of prevention, recovery-oriented system of care, and “no wrong door” service philosophy, as well as shifting and sustainable-funding models. This phase will culminate in full implementation by July 1, 2028.

The project will include two interrelated and overlapping workflows:

Workflow A: Assessment of Administrative Services — Focused on determining and identifying efficiencies and develop the most appropriate department-level model for finance, contracting, procurement, human resources, and other administrative functions.

Workflow B: Program Delivery Structure Alignment — Focused on developing and implementing a department-wide program-delivery organizational structure aligned with prevention-based and recovery-oriented frameworks, integrated service pathways, and sustainable funding and community-need models.

Dual-Track Milestones (subject to change as needed):

| | |
|-----------------|--|
| April-June 2026 | Joint Discovery & Planning |
| October 2026 | Assessment of Administrative Services Framework presented |
| July 2027 | Revised Administrative Services Framework operationalized Present Integrated Organizational Direction (administration and program alignment) to leadership for review |
| October 2027 | Department Program Delivery Structure Alignment Framework finalized |
| July 2028 | Department Program Delivery Structure Alignment Framework operationalized |

Contractor should submit monthly invoices for services provided. Travel expenses are allowable under this agreement. Final deliverable is the final report, which must be reviewed & accepted by H3S before final payment is made.

3.4. Term of Contract:

The term of the contract shall be from the effective date through **June 30, 2028**.

3.5. Sample Contract: Submission of a Proposal in response to this RFP indicates Proposer’s willingness to enter into a contract containing substantially the same terms (including insurance requirements) of the sample contract identified below. No action or response to the sample contract is required under this RFP. Any objections to the sample contract terms should be raised in accordance with Paragraphs 2.2 or 2.3 of this RFP, pertaining to requests for clarification or change or protest of the

RFP/specifications, and as otherwise provided for in this RFP. This RFP and all supplemental information in response to this RFP will be a binding part of the final contract.

The applicable Sample Personal Services Contract for this RFP can be found at <https://www.clackamas.us/finance/terms.html>.

Personal Services Contract (unless checked, item does not apply)

The following paragraphs of the Professional Services Contract will be applicable:

- Article I, Paragraph 5 – Travel and Other Expense is Authorized
- Article II, Paragraph 28 – Confidentiality
- Article II, Paragraph 29 – Criminal Background Check Requirements
- Article II, Paragraph 30 – Key Persons
- Article II, Paragraph 31 – Cooperative Contracting

The following insurance requirements will be applicable:

- Commercial General Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per occurrence, with an annual aggregate limit of \$2,000,000 for Bodily Injury and Property Damage.
- Professional Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per occurrence, with an annual aggregate limit of \$2,000,000 for damages caused by error, omission or negligent acts.
- Automobile Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per occurrence for Bodily Injury and Property Damage.

SECTION 4 EVALUATION PROCEDURE

4.1 An evaluation committee will review all Proposals that are initially deemed responsive and they shall rank the Proposals in accordance with the below criteria. The evaluation committee may recommend an award based solely on the written responses or may request Proposal interviews/presentations. Interviews/presentations, if deemed beneficial by the evaluation committee, will consist of the highest scoring Proposers. The invited Proposers will be notified of the time, place, and format of the interview/presentation. Based on the interview/presentation, the evaluation committee may revise their scoring.

Written Proposals must be complete and no additions, deletions, or substitutions will be permitted during the interview/presentation (if any). The evaluation committee will recommend award of a contract to the final County decision maker based on the highest scoring Proposal. The County decision maker reserves the right to accept the recommendation, award to a different Proposer, or reject all Proposals and cancel the RFP.

Proposers are not permitted to directly communicate with any member of the evaluation committee during the evaluation process. All communication will be facilitated through the Procurement representative.

4.2 Evaluation Criteria

| <u>Category</u> | <u>Points available:</u> |
|--|--------------------------|
| Understanding of the Scope of Work and the general approach to the project | 30 pts |
| Experience with projects of similar complexity and function | 15 pts |
| Cost competitiveness | 15 pts |
| Qualifications of the Proposer’s staff assigned to the project | 20 pts |
| Unique or special capability | 20 pts |
| Total | 100 pts |

4.3 Once a selection has been made, the County will enter into contract negotiations. During negotiation, the County may require any additional information it deems necessary to clarify the approach and understanding of the requested services. Any changes agreed upon during contract negotiations will become part of the final contract. The negotiations will identify a level of work and associated fee that best represents the efforts required. If the County is unable to come to terms with the highest scoring Proposer, discussions shall be terminated and negotiations will begin with the next highest scoring Proposer. If the resulting contract contemplates multiple phases and the County deems it is in its interest to not authorize any particular phase, it reserves the right to return to this solicitation and commence negotiations with the next highest ranked Proposer to complete the remaining phases.

SECTION 5 PROPOSAL CONTENTS

5.1. Vendors must observe submission instructions and be advised as follows:

5.1.1. Proposals will only be accepted electronically thru Equity Hub’s Bid Locker. Email submissions to Clackamas County email addresses will no longer be accepted.

5.1.2. Completed proposal documents must arrive electronically via Equity Hub’s Bid Locker located at <https://bidlocker.us/a/clackamascountry/BidLocker>.

5.1.3. County reserves the right to solicit additional information or Proposal clarification from the vendors, or any one vendor, should the County deem such information necessary.

5.1.4. Proposal may not exceed a total of **30 pages** (single-sided), inclusive of all exhibits, attachments, title pages, pages separations, table of contents, or other information. The Proposal Certification Page will NOT count towards the final page count.

Provide the following information in the order in which it appears below:

5.2. Understanding of the Scope of Work and general approach to the project:

- Description of the firm. Highlight any knowledge of or experience working with government funded programs that are aligned with prevention-based and recovery-oriented frameworks.
- Description of the firm’s ability to meet the requirements in Section 3. Specifically, address the following in your proposal:
 - Describe your specific assessment framework/approach and any tools/models you use for gathering data and analyzing organizational and financial health. Include specific fiscal modeling techniques to test long-term viability and how they are integrated with strategic goals.
 - Describe your methods for presenting findings and developing recommendations.
 - Describe your approach /process for stakeholder engagement, managing change, and building internal capacity for long-term sustainability.
 - Discuss how you ensure findings lead to achievable plans and lasting change.
 - Describe your experience applying equity decision-making principles and using a trauma – informed approach.

5.3. Experience with projects of similar complexity and function

- Description of providing similar services to public entities of similar size within the past five (5) years.

5.4. Cost competitiveness

Fees should be on a time and material basis with a not-to-exceed fee basis. Fees should be sufficiently descriptive to facilitate acceptance of a Proposal. List the not-to-exceed amount you propose for the service.

5.5. Qualifications of the Proposer’s staff assigned to the project

- Credentials/experience of key individuals that would be assigned to this project.

5.6. Unique or special capability

- Description of what distinguishes the firm from other firms performing a similar service.

5.7. References

Provide at least three (3) references from clients your firm has served similar to the County in the past three (3) years, including one client that has newly engaged the firm in the past thirty-six (36) months and one (1) long-

term client. Provide the name, address, email, and phone number of the references. Please note the required three references may not be from County staff, but additional references may be supplied.

5.8. Completed Proposal Certification (see the form below)

PROPOSAL CERTIFICATION

RFP #2025-89

Submitted by: Health Management Associates, Inc. Michigan
(Must be entity’s full legal name, and State of Formation)

Each Proposer must read, complete and submit a copy of this Proposal Certification with their Proposal. Failure to do so may result in rejection of the Proposal. By signature on this Proposal Certification, the undersigned certifies that they are authorized to act on behalf of the Proposer and that under penalty of perjury, the undersigned will comply with the following:

SECTION I. OREGON TAX LAWS: As required in ORS 279B.110(2)(e), the undersigned hereby certifies that, to the best of the undersigned’s knowledge, the Proposer is not in violation of any Oregon Tax Laws. For purposes of this certification, “Oregon Tax Laws” means the tax laws of the state or a political subdivision of the state, including ORS 305.620 and ORS chapters 316, 317 and 318. If a contract is executed, this information will be reported to the Internal Revenue Service. Information not matching IRS records could subject Proposer to 24% backup withholding.

SECTION II. NON-DISCRIMINATION: That the Proposer has not and will not discriminate in its employment practices with regard to race, creed, age, religious affiliation, sex, disability, sexual orientation, gender identity, national origin, or any other protected class. Nor has Proposer or will Proposer discriminate against a subcontractor in the awarding of a subcontract because the subcontractor is a disadvantaged business enterprise, a minority-owned business, a woman-owned business, a business that a service-disabled veteran owns or an emerging small business that is certified under ORS 200.055.

SECTION III. CONFLICT OF INTEREST: The undersigned hereby certifies that no elected official, officer, agent or employee of Clackamas County is personally interested, directly or indirectly, in any resulting contract from this RFP, or the compensation to be paid under such contract, and that no representation, statements (oral or in writing), of the County, its elected officials, officers, agents, or employees had induced Proposer to submit this Proposal. In addition, the undersigned hereby certifies that this proposal is made without connection with any person, firm, or corporation submitting a proposal for the same material, and is in all respects fair and without collusion or fraud.

SECTION IV. COMPLIANCE WITH SOLICITATION: The undersigned further agrees and certifies that they:

1. Have read, understand and agree to be bound by and comply with all requirements, instructions, specifications, terms and conditions of the RFP (including any attachments); and
2. Are an authorized representative of the Proposer, that the information provided is true and accurate, and that providing incorrect or incomplete information may be cause for rejection of the Proposal or contract termination; and
3. Will furnish the designated item(s) and/or service(s) in accordance with the RFP and Proposal; and
4. Will use recyclable products to the maximum extend economically feasible in the performance of the contract work set forth in this RFP.

Name: Kelly Johnson Signed by: February 3, 2026 | 10:39 PST
Signature: *Kelly Johnson* 7533E7CBA7A5470... Title: Chief Administrative Officer
Email: proposals@healthmanagement.com Telephone: (517) 482-9236
Oregon Business Registry Number: 967736-93 OR CCB # (if applicable): _____

Business Designation (check one):
 Corporation Partnership Sole Proprietorship Non-Profit Limited Liability Company
 Resident Quoter, as defined in ORS 279A.120
 Non-Resident Quote. Resident State: Michigan

**EXHIBIT B
VENDOR'S PROPOSAL**



PROPOSAL TO PROVIDE

Organizational Assessment and Fiscal Sustainability Analysis

PRESENTED TO
Clackamas County

RFP#: 2025-89
February 12, 2026

Health Management Associates, Inc.
2501 Woodlake Circle
Suite 100
Okemos, MI 48864
(517) 482-9236
HealthManagement.com

February 12, 2026

Ryan Rice
Contract Analyst
Clackamas County

Dear Mr. Rice:

Health Management Associates, Inc. (HMA) is pleased to submit our proposal to Clackamas County to provide Organizational Assessment and Fiscal Sustainability Analysis services in response to RFP 2025-89.

County health and human services agencies are facing significant challenges due to fiscal and policy changes from Washington, DC. Clackamas County Health Housing and Human Services (H3S) leaders will need to understand these changes and help move the organization, its systems, and services forward for the community, especially those most underserved. The delivery of human services is a complex web of services, partners, funding, priorities, and policies. Our team has the experience and expertise needed to work closely with the department to assess and organize systems to optimize efficiency, effectiveness, and impact.

HMA brings comprehensive expertise to H3S. Our team members understand your challenges, having faced similar ones before joining HMA. **Our team includes former county leaders who have implemented effective, integrated health, housing, and human services agencies that have remained sustainable and impactful.** HMA's interdisciplinary human services team has extensive expertise in service delivery, consulting, policy, operations, and funding for local governments across the country. In addition, HMA has a subcontractor with lived experience who can support the authentic engagement of marginalized populations. HMA is flexible to H3S's needs. For example, because workforce is a critical issue, HMA has added a national expert to our team who specializes in workforce strategy, non-traditional partnerships, and workforce training.

This is a critical time for all health, housing, and human service agencies as they face myriad pressures. This HMA team will strive to understand the unique system and pressures in Clackamas County and provide you with the tools needed to implement a business model that aligns with your culture, goals, and the priority needs in your community.

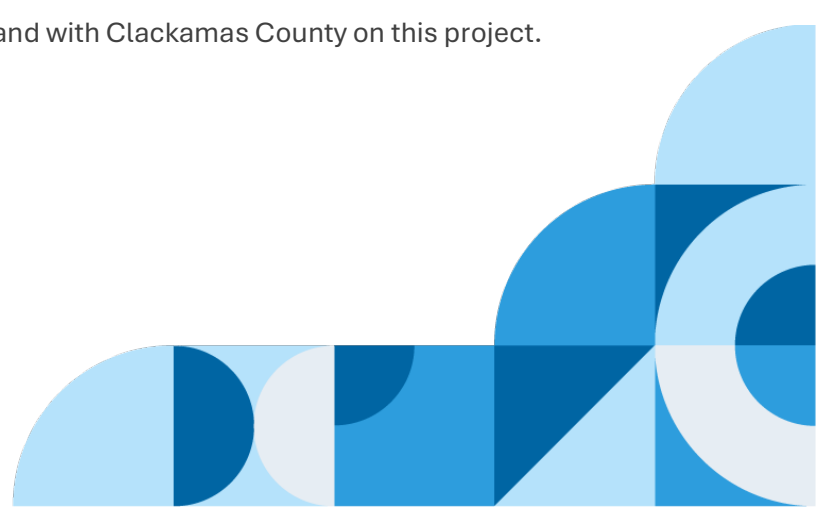
For questions relating to this proposal, please contact Sharon Bunyard, director of proposals, at proposals@healthmanagement.com. For contracting matters, please contact Becky Pasch, director of contracts, at contracts@healthmanagement.com. You can reach all HMA departments at 517-482-9236. As chief administrative officer, I am authorized to bind HMA contractually with this bid.

We are excited about the prospect of working for and with Clackamas County on this project.

Sincerely,

A handwritten signature in blue ink that reads "Kelly Johnson". The signature is written in a cursive, flowing style.

Kelly Johnson
Chief Administrative Officer



5.2 Understanding of Project Scope and Proposed Approach

Health Management Associates, Inc. (HMA) understands that the Clackamas County Health Housing and Human Services (H3S) Department seeks a consulting partner to conduct a comprehensive organizational and fiscal sustainability assessment across its six divisions and the H3S Director's Office. Driven by intense funding pressures and shifting state and federal priorities, the assessment is expected to culminate in a set of recommendations to modernize H3S's organizational and internal systems, foster financial sustainability and strength, and align programmatic work across divisions—all with the goal of better serving the communities in Clackamas County.

We recognize that you have rapid demographic changes, rising behavioral health needs and complexity of needs, and significant housing and workforce challenges. Clackamas County has 426,000 people and a poverty rate of 7.48 percent (source: U.S. Census Bureau). We understand that as you think about changes the partnership with bargaining units is critical and our team has experience working through system transformation and engaging them in an authentic manner.

The county has a network of community partners through the Behavioral Health Resource Network and the Aging and Disability Resource Centers, but how do services across systems work together to support marginalized populations in getting the right services in the right amount at the right time? Is your housing navigation pilot accomplishing what you hoped it would for seniors and individuals with disabilities? Is it approving navigation and access?

Clackamas County has made real progress—your supportive housing system impressively houses approximately 2,300 people (source: Clackamas County – Supportive Housing Services)—but shifting US Department of Housing and Urban Development priorities away from permanent supportive housing now threatens the stability of the very programs that work. At the same time, an aging population and major reductions in traditional public health funding are putting additional strain on an already stretched system.

Like many communities, your federally qualified health centers serve high-need individuals, but they tend to serve people with the highest needs for medical, dental, and behavioral health services. Funding and capacity are issues that challenge counties like Clackamas. We have completed fiscal reviews of county-based federally qualified health centers to assess sustainability, and there is often a struggle between productivity and connecting with clients.

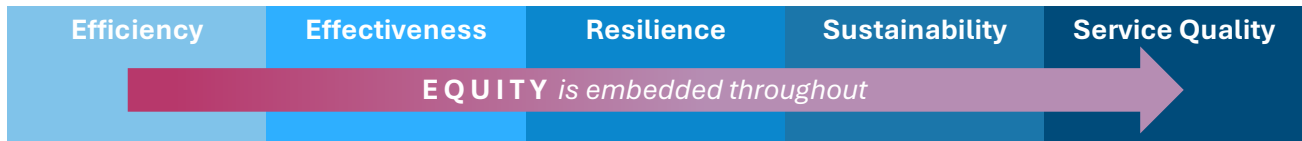
Together, we will explore an integrated approach that aligns and braids your many funding streams so that they reinforce each other and deliver the greatest possible impact for the community.

HMA welcomes the opportunity to learn more and support H3S's goals. We are well-positioned to collaborate with the county to:

- Analyze the organizational and financial structures of each division and how they interact and impact sustainability within divisions and across the agency
- Evaluate the service structures in systems to determine whether provision by community agencies or the county makes the best sense based on cost, outcomes, and accountability
- Assess the strengths and areas for improvement, as well as how functions and administrative and operational services might be better integrated across H3S to maximize impact in the community and create the most sustainable business model
- Examine models from comparable county agencies (exclusive to Oregon or outside of Oregon) for benchmarking the organization and define opportunities for financial resilience and sustainability
- Develop recommendations and options for H3S leadership to consider streamlining operations and engage the full team in the change process as decisions are considered
- Build an implementation plan in partnership with H3S leadership that reflects the assessment work, change management approach, and engagement, along with tools to measure the success of the changes

While the goals for this project emphasize efficiency and financial sustainability, we believe these goals cannot be achieved without a parallel focus on the quality and effectiveness of the services provided, all within a sustained commitment to equity. This project seeks to align quality, accessibility, and economic enhancement efforts with H3S’s mission, the goals of its strategic plan, and overarching county priorities, resulting in improvements shown in Exhibit 1

Exhibit 1. Areas of Improvement



Our team has worked in counties focused on similar efforts prior to joining HMA, as well as with counties and government-funded programs across the country, including with the Clackamas County continuum of care, and nearby counties in Oregon. Our extensive experience provides us with foundational knowledge. This allows us to tailor tools to our clients' unique responsibilities, preferences, and political realities. As a result, we can perform this work efficiently and with deep insight because we understand how other counties have approached similar challenges, including what has worked and what could be improved.

Firm Profile and Prevention/Recovery Government Program Expertise

Planning and implementing change to improve outcomes and efficiency is core to HMA.

Founded in 1985, HMA is a leading independent, national research and consulting firm that focuses on improving the administration and delivery of public health, healthcare, and social services programs by providing evaluation and research, analysis and assessment, policy development and implementation, technical assistance, organizational effectiveness and development, training, and strategic planning. We bring national perspectives and benchmarking capacity while tailoring recommendations to local governance, funding constraints, and operational realities. HMA’s team includes approximately 650 consulting and 850 total employees, providing services in all 50 states, the District of Columbia, and several US territories. Our offices are headquartered in Michigan, and we maintain offices in more than 20 states and Washington, DC.

Working with government health and human services programs is a key focus for HMA.

HMA has distinguished itself from other consulting companies by our decades-long tradition of hiring senior-level experts, such as former state and local public health and human services leaders, directors of community-based organizations, and former senior officers from key federal agencies. We understand the complexity of designing and implementing change at more than just a theoretical level—we have walked in the shoes of our clients and understand how to provide insight that is meaningful, actionable, and realistic.

In addition to our local project team members, two individuals with direct experience integrating health and human services for a county will lead this project. Paul Fleissner will serve as project director, and Sarah Oachs will serve as project manager. Both Paul and Sarah held leadership positions in Olmsted County, Minnesota, and led transformational efforts to integrate health and human services. Locally, Libby Hutter, the former chief executive officer of Cedar Hills Hospital and Outpatient Services, has experience working with Clackamas County’s behavioral health services and is skilled in optimizing business operations, revenue cycle management, capacity improvement, and health information technology. David DiGiuseppe, based in neighboring Washington state, will focus on fiscal sustainability, drawing from his experience as a health plan’s finance leader optimizing revenue streams, analyzing expense drivers, preparing financial forecasts and scenarios, and evaluating program performance.

HMA brings extensive hands-on experience in understanding the role county programs play in prevention and recovery. Collectively, our expert consultants have completed nearly 300 projects for county agencies in the last five years, **including seven in Oregon alone.** We carefully selected our proposed consultants for this project based on their decades of experience working with and for counties nationwide, as well as their programmatic and technical expertise in public health and human services, including prevention-based and recovery-oriented service delivery frameworks. **Demonstrating our understanding of the importance of prevention and recovery in program design and development, we designed and implemented a prevention program for high-risk mothers at risk of homelessness.** This work included creating an integrated housing pathway for young mothers that connected public assistance, family home visiting, behavioral health, child welfare, employment and training services, and stable housing supports. In partnership with the Jeremiah Program, we developed a two-generation housing model that provided safe housing for young women with children, contingent on enrollment in education or workforce-training programs leading to a livable wage. The model also offered high quality, on-site early childhood education to help both mothers and children achieve long-term stability and economic mobility. Learn more: <https://jeremiahprogram.org/campuses/rochester-southeast-mn/>

HMA’s commitment to equity aligns with H3S’s commitment. With a commitment to equity and impact, HMA’s proposed project team is well-versed in applying methodologies that enhance program effectiveness and promote dignity, safety, and equitable outcomes for diverse populations. HMA will work with H3S, its stakeholders, and its community partners in this assessment effort to ensure the process is participatory, inclusive, responsive, grounded in equity, and representative of the community.

Commitment to Equity
HMA is committed to fostering, cultivating, and preserving a culture of diversity, equity, and inclusion.

Our team members have worked closely with Clackamas, Multnomah, and other Oregon counties to conduct comprehensive, meaningful, and multilingual community engagement, with a particular focus on incorporating the perspectives of those with lived experience. For example, George Lewis is a partner on our team with deep roots in community engagement. George leverages his lived experience in recovery to help behavioral health providers better understand how to work with diverse populations.

HMA’s Ability to Meet the Scope of Work Requirements

HMA has the expertise and the capacity to perform this project efficiently and collaboratively. Our goal is to leave Clackamas County with practical, achievable strategies you can implement successfully. Our work is guided by a human services value framework, grounded in data, and supported by robust project management and collaborative governance. HMA’s project manager is a **Lean Six Sigma Black Belt** and is **Malcolm Baldrige trained**. Below is an overview of our proposed approach, illustrating our ability to fully address and deliver on the requirements of this project.

Proposed Approach

We will apply the phases in Exhibit 2 across both Workflow A (Administrative Services) and Workflow B (Program Delivery) to ensure efficiency, share common information effectively, and offer opportunities for cross-workflow insight. As noted in our team’s organizational chart in Section 5.5, to ensure efficiency for the stakeholders, HMA will conduct assessment and evaluation activities concurrently for both Workflows A and B. Unless noted, we will apply the activities we describe for each phase to both workflows.

Exhibit 2. Project Phases



PHASE
1

Project Initiation and Kickoff (March–April 2026)

During this phase, HMA will engage with leadership from H3S to establish the project Steering Committee. The Steering Committee will serve as HMA’s primary touchpoint throughout the project and provide ongoing strategic guidance and decision-making. HMA will work with the Steering Committee to validate the project scope, refine the approach as needed, and establish shared expectations regarding project roles, approach, communication methods/frequency, and final deliverables.

HMA will work with the Steering Committee to establish a project team comprising key stakeholders involved in or impacted by the effort. HMA will plan and facilitate a kickoff meeting to introduce HMA team members, the proposed project approach and timeline (including how we will engage stakeholders), the desired outcome(s), and the final deliverables to expect.

HMA will also use the project initiation period to:

- Complete an initial review of existing background information, data, and documentation about H3S to ensure our consulting team has a solid foundation of understanding prior to launching the second phase of work
- Plan and facilitate a kickoff meeting
- Establish project communication requirements and preferences to support the development of a communication plan

Phase 1 Key Deliverables:

- Project Charter
- Project Work Plan
- Communication Plan



LEVERAGING LESSONS LEARNED

In our experience, it is critical to begin a project of this magnitude with a clear understanding between all parties of the process and final deliverables to ensure high-quality outcomes and avoid inefficiencies, misunderstandings, or unclear expectations.

PHASE
2

Discovery and Assessment (April–October 2026)

Phase 2 encompasses a comprehensive assessment of the current organizational and service delivery structures across both Workflow A (Administrative Services) and Workflow B (Program Delivery). For Workflow A, we will examine the structure, staffing, and performance of core administrative functions, such as finance, human resources, procurement, and information technology, identifying opportunities for consolidation, standardization, or modernization. For Workflow B, we will assess how programs are currently organized and delivered across the six H3S divisions, with a focus on alignment, duplication, service gaps, and opportunities for integration. A common set of quantitative data (e.g., budgets, staffing, service utilization) and qualitative insights gathered through stakeholder engagement will inform the analysis for both workflows.

Evaluation Framework

As part of this phase, HMA will work with H3S leadership to select an evaluation framework, or combination of frameworks, that best aligns with the county’s values and strategic goals. HMA will apply this framework consistently to assess the current organizational and service delivery structures and, in subsequent phases, to evaluate the feasibility, equity impact, and sustainability of potential new service models. By co-selecting the evaluation approach, we ensure that the process is transparent, inclusive, and tailored to Clackamas County’s unique context. The selected framework will also support implementation planning and long-term progress monitoring.

To guide the identification of an evaluation framework, it can be helpful to leverage nationally recognized frameworks that reflect best practices in public-sector transformation, such as:

- **Organizational Maturity and Integration:** The Human Services Value Curve can help assess where H3S currently sits and identify opportunities to evolve from compliance-driven operations toward more collaborative, integrative, and generative service delivery.
- **Performance and Accountability:** Results-Based Accountability is a performance management framework that we can use to ensure new models are grounded in measurable outcomes that reflect improved lives, not just increased activity. The Performance Excellence Framework will support internal alignment, leadership accountability, and continuous improvement.
- **Equity and Community Partnership:** The Collective Impact Framework guides alignment with external partners around shared goals and coordinated action. Equity-Centered Systems Change Models (e.g., Government Alliance on Race and Equity) ensure racial equity is embedded in decision-making and implementation. Trauma-Informed Systems Principles (e.g., Substance Abuse and Mental Health Services Administration) guide how models support staff well-being, client dignity, and culturally responsive service delivery.

Assessment Framework and Fiscal Modeling Integration

HMA's assessment framework is built to maximize the value of existing data while strategically incorporating new information, including insights from a diverse set of key informants. Using a mixed-methods approach, we will conduct a comprehensive assessment of H3S programs and operations, drawing on quantitative and qualitative sources to understand performance, identify gaps, and recommend opportunities.

Working closely with H3S leadership, we will map available analyses, reports, datasets, and documents. We will also identify additional key stakeholders to deepen our understanding of current conditions and historical context. This approach supports shared learning and helps shape sustainable, integrated models that address disparities and other critical challenges.

We will organize our work across functional workstreams—Administration and Operations; Engagement; and Policy, Best Practice, Process—to fully assess the six H3S divisions, shared services, and fiscal conditions. Workstream leads will collaborate, use a unified analysis and stakeholder engagement approach, and, where appropriate, assess fiscal conditions. We will synthesize insights across workstreams to develop models and recommendations that reflect the full complexity and strengths of the local ecosystem.

Quantitative Data Analysis

HMA will review and analyze available documents, reports, and data to better understand the scope of services, how those services are currently provided, the level and quality of services, and related financial and operational trends. The aim of the quantitative analysis will be twofold: (1) identify key issues, trends, and opportunities for improvement, which we can use for further research and investigation during the qualitative data analysis; and (2) set the stage for recommending methods to monitor performance improvements for the initiatives H3S decides to implement. Exhibit 3 provides a sample of the anticipated data and sources we anticipate utilizing for our assessment.

Exhibit 3. Anticipated Data Collection

| Topic | Topics Addressed | Potential Data Sources |
|---|--|---|
| Population | <ul style="list-style-type: none"> ■ County demographics ■ Recent trends/projections ■ County comparisons | <ul style="list-style-type: none"> ■ US Census Bureau ■ American Community Survey – Clackamas County Profile ■ Clackamas County documents/data ■ Cubit Planning ■ Casey Kids Count |
| Utilization | <ul style="list-style-type: none"> ■ Current program service utilization ■ Unserved or underserved (eligible but not accessing)/waiting lists ■ Disparities | <ul style="list-style-type: none"> ■ Program data (local, state, federal) ■ Interviews/focus groups ■ Surveys |
| Services | <ul style="list-style-type: none"> ■ Service mandates and obligations ■ Programs delivered and populations served ■ Programmatic and/or client trends ■ Recent investments/initiatives ■ Strengths/challenges | <ul style="list-style-type: none"> ■ Interviews ■ Research – best practices ■ Focus groups ■ Program area reports |
| Funding Sources and Cost Allocations | <ul style="list-style-type: none"> ■ Major federal, state, county funding – Oregon Housing & Community Services, Oregon Health Authority, Supportive Housing Service Funds, Victims of Crime Act, public health grants, behavioral health funds, etc. ■ Approach to cost allocation ■ Central and Administrative Costs ■ County investment ■ Funding challenges and opportunities | <ul style="list-style-type: none"> ■ Interviews ■ Budget reports ■ Funding sources/mix ■ Cost allocation reports ■ State Medicaid |

Qualitative Data Analysis

HMA will use various methods of qualitative analysis to capture internal H3S and external stakeholder input, identify where perceptions share common themes or differ, understand areas of concern or opportunities, solicit improvement ideas, and capture related barriers. Qualitative data gathering will be held confidential and used to identify common themes. No data will be individually attributable.

Key stakeholders and the reasons for engaging them will be diverse, so we will develop with H3S leadership an appropriate stakeholder engagement plan that incorporates differing methods and timing. The qualitative methods we expect to use and the stakeholders for whom they are most useful are described in Exhibit 4.

Exhibit 4. Stakeholder Engagement Methods and Participants

| Method | Description | Participants |
|------------------------------|--|--|
| Individual interviews | HMA will conduct up to 12 individual interviews with internal and external leaders. Interviews will follow a structured protocol. We will primarily conduct them virtually, with some potentially in person during the in-person early engagement effort described in the Stakeholder Engagement section. We will design questions to fill information gaps, surface operational insights, and gather perspectives on strengths, challenges, and opportunities across H3S. | Division directors, program managers, and county leadership, including key external partners with broad knowledge of H3S operations or community needs. |
| Focus groups | HMA will facilitate up to six virtual focus groups, each with six to eight participants, including potentially one or two during our in-person early engagement effort described in the Stakeholder Engagement section. We will organize to ensure participants feel comfortable sharing insights. Each session will follow a structured guide and result in a summary of key themes. | Frontline staff, supervisors, administrative teams, community partners, and individuals who received H3S services. We will tailor focus groups to reflect diverse roles and lived experiences across H3S and its stakeholders. |

Optional Survey. HMA may develop a brief online survey to gather broader input from staff or community partners. HMA has extensive experience developing surveys and using various survey tools. Our budget does not assume the creation of this survey, but it could be added as an optional task if requested.

Exhibit 5. Proposed Financial Analysis and Modeling

| Proposed Activities | Output | Value to H3S |
|---|--|---|
| Step 1. Review of H3S's Revenue Structure | | |
| <ul style="list-style-type: none"> ■ Catalog H3S's funding streams by source (e.g., federal), restriction level (e.g., discretionary), and renewal risk ■ Distinguish revenue and revenue opportunities for H3S as an administrative entity versus a clinical delivery system ■ Identify dependencies on at-risk funding and assess the alignment of funding with organizational goals (e.g., prevention, equity) ■ Compare H3S to peer integrated health and human services departments | <ul style="list-style-type: none"> ■ Opportunities to achieve revenue diversification and resilience to funding source risk ■ Untapped funding opportunities: administrative and clinical service-oriented funding ■ Medicaid opportunities, including 1115 waiver opportunities ■ Other federal funds as appropriate, such as 4E funding and Family First Prevention Services Act funds | <p>Critical context on how other county leaders around the nation view the revenue landscape and are fortifying for future financial sustainability</p> |
| Step 2. Review of H3S's Expense Structure and Cost Drivers | | |
| <ul style="list-style-type: none"> ■ Analyze expenditures by division/department, overhead versus program, and internal versus contracted ■ Identify cost pressures, including labor market dynamics and program volume increases ■ Validate whether revenue supports spending or it requires tapping into reserves ■ Assess the financial management systems: tracking revenue and expense versus budget; tracking program performance metrics and return on investment; and managing reserves, financial forecasting and impact modeling, risk assessment and mitigation, budgeting, contracting strategy and vendor management, and financial support for strategic planning ■ Compare H3S's financial operating statistics to industry norms on metrics such as administrative cost ratios, staffing levels, and program-to-overhead balance ■ Identify potential revenue sources, such as Medicaid, the Family First Prevention Services Act, etc. | <ul style="list-style-type: none"> ■ Assessment of H3S's current financial health ■ Identification of gaps in performance relative to best practices and optimal fiscal discipline ■ Opportunities to train financial leadership ■ Opportunities to strengthen alignment among finance, operations, and outcomes ■ Opportunities to improve program performance to justify current or new funding options ■ Opportunities and strategies for new revenue sources | <p>Objective assessment by experienced financial leaders regarding H3S's tools, identification of opportunities to strengthen performance, and refinement of metrics for future impact and performance monitoring</p> |
| Step 3: Multiyear Scenario Modeling | | |
| <ul style="list-style-type: none"> ■ Understand existing H3S financial models ■ Assuming there is opportunity here, construct a three- to five-year financial model to run scenarios relative to baseline-projected funding, modeling material revenue and expense shocks, such as significant federal funding reductions, operational consolidation savings, and demand-driven cost growth, with model functionality and assumptions finalized in collaboration with H3S leadership (including incorporating potential revenue and cost savings attributable to recommendations under consideration for service integration and other redesign initiatives) | <ul style="list-style-type: none"> ■ Leave-behind Excel-based model and user guide for H3S to continue modeling scenarios after the engagement ends | <p>Insights into planning and building resilience, and a dynamic tool to model additional scenarios as conditions change</p> |
| Step 4: Equity Considerations | | |
| <ul style="list-style-type: none"> ■ Define potential unforeseen consequences of financially driven internal organizational changes (e.g., workforce impacts across divisions as functional responsibilities shift from decentralized to centralized) ■ Define potential unforeseen consequences to constituents and the community at large from financially driven changes (e.g., disproportionate service impacts of program reductions) | <ul style="list-style-type: none"> ■ Critical equity considerations integrated into scenario evaluation and recommendation prioritization | <p>Spectrum of considerations based on a wide range of HMA consulting engagements aimed at enhancing health equity</p> |
| Step 5: Integration | | |
| <ul style="list-style-type: none"> ■ Draft recommendations based on Steps 1 through 4 and integrate them with the overall project recommendations and implementation roadmap | | |

Fiscal Modeling Integration

The fiscal modeling integration component of our assessment will complement and lend further insight into the operational and programmatic assessment activities described in Exhibit 5 on the previous page. We aim to support H3S's long-term sustainability through the five-step process detailed in Exhibit 5. This approach will assess H3S's current financial health and structural drivers of cost and risk, test long-term financial viability under multiple scenarios, and optimize revenue opportunities to position H3S for future financial sustainability. Our kickoff meeting will confirm priorities and sequencing to ensure the financial analysis delivers maximum value to H3S while remaining fully aligned with the overall scope and objective.

Phase 2 Key Deliverables:

- Interim summary of findings and initial recommendations, including summarized results of your quantitative analysis, SWOT (strengths, weaknesses, opportunities, and threats) analysis, disparities in health indicators, unmet/emerging/growing service needs or gaps, findings from interviews, and fiscal information.
- Assessment of administrative services framework

PHASE

3

Findings and Recommendations (November 2026–October 2027)

The project team will collaborate with H3S to move from analysis to recommendations, ensuring to align proposed recommendations with the project's goals of:

- Achieving efficiency and reducing redundancies
- Ensuring the strategic placement of functions (divisional or departmental)
- Deriving cost savings potential (e.g., services that could be contracted)
- Facilitating a decision-making process for H3S

Our recommendations will identify ways to streamline and align services across the division, eliminate duplication, and strengthen structures that support belonging and empowerment. We will also assess funding models through an equity lens to ensure you know where to deploy resources to create the greatest impact and address disparities.

Drawing on our national experience, HMA will share lessons learned from other counties that have undertaken similar transformations, highlighting what worked, what did not, and why. Ultimately, our role is to support H3S in selecting a service model that reflects the community's needs, honors its workforce, and advances its strategic goals. By grounding this process in equity, collaboration, and evidence while using complementary evaluation frameworks as guiding tools, HMA will help Clackamas County evolve its service delivery in a way that is resilient, responsive, and ready for the future.

Methods for Presenting Findings and Developing Recommendations

HMA's process is based on the gradual rollout of findings, so the process itself acts as a thoughtful communication vehicle rather than one that overwhelms with too much information at one time. This approach allows feedback to inform additional analysis and the development of recommendations.

Rather than prescribing a single solution, HMA will bring forward a curated set of service models that have demonstrated success in comparable jurisdictions. These models will serve as a foundation for exploration. We will evaluate them in partnership with H3S leadership, staff, and community stakeholders to determine their relevance and adaptability to Clackamas County's unique context, considering, for example, the models shown in Exhibit 6.

Exhibit 6. Examples of Service Models



Per the RFP, we anticipate the assessment and development of recommendations will take place between April and October 2026. We expect approximately six to eight opportunities to present findings to the Steering Committee and project team during this time period. We will work with the H3S project lead to establish an agenda and prepare materials for each meeting in advance, giving the Steering Committee time to reflect on the analysis.

During each Steering Committee meeting, participants can ask questions, offer feedback, and suggest additional areas of inquiry. Each meeting will serve as a mini-design session, where HMA facilitates the discussion, shares its insights on important conclusions of the analysis, and potentially tests ideas for some of the options under consideration.

HMA will hold periodic whiteboard sessions throughout our assessment process with project team members to support the identification of potential actions H3S can take to enhance program effectiveness, efficiency, and equity. We will use feedback from the Steering Committee and from sharing results across workstreams to inform this process.

LEVERAGING LESSONS LEARNED

We have found it is important to reach a common understanding of what is most important to H3S leadership and its stakeholders before the facilitated decision-making process.

In preparation for the facilitated decision-making process, HMA will prepare a matrix of potential options, with a discussion of how each compares across a series of important assessment criteria. We have found it is important to reach a common understanding of what is most important to H3S leadership and its stakeholders before the facilitated decision-making process. Therefore, we will use one of the Steering Committee meetings to explore, adjust, and prioritize the suggested criteria (Exhibit 7) based on participant feedback.

Exhibit 7. Suggested Criteria for Comparing and Assessing Recommendations

| STRATEGIC | OPERATIONAL/FISCAL | LEVEL OF EFFORT/IMPACT |
|---|--|--|
| <ul style="list-style-type: none"> ■ Fit with: <ul style="list-style-type: none"> > Mission > H3S or county strategy/goals ■ Addresses: <ul style="list-style-type: none"> > Equity impact or disparities > Program mandates > Impact related to trauma > Unmet or under-met needs > Community concerns | <ul style="list-style-type: none"> ■ Identified need or opportunity ■ Potential solution: <ul style="list-style-type: none"> > Workforce > Information systems > Partners required > Reorganization > Other operational > Likely financial impact/timing > Overlapping dependencies | <ul style="list-style-type: none"> ■ Timing to implement ■ Funding to implement ■ Political or regulatory change ■ Workforce capacity/retraining ■ Information systems ■ Physical locations ■ Partnering potential ■ Revenue opportunities |

Facilitating Decision-Making on Recommendations. HMA will facilitate decision-making with the Steering Committee, meeting in a mutually agreed-upon format (e.g., a retreat or a series of facilitated design sessions, or the assembly of individual feedback and input). At this point, the Steering Committee will have had periodic discussions of findings, tested early recommendations, and had an opportunity to weigh in on the relative importance of the assessment criteria.

Phase 3 Key Deliverables:

- Revised administrative services framework and integrated organizational direction presentation
- Summary of findings and draft recommendations for the department program delivery structure alignment framework
- A comparative matrix highlighting the pros and cons of different models and the level of effort needed to implement each

PHASE 4 Implementation Planning and Support (July 2027–June 2028)

HMA will assist H3S in developing an implementation plan that identifies key actions, responsibilities, timing, investment, success drivers, potential barriers or contingencies, and the necessary involvement of parties outside this decision-making process. Implementation planning and activities will align with H3S’s goal of achieving a framework by October 2027.

Ensuring Achievable Plans and Lasting Change

A thoughtful, actionable, and thorough implementation plan outlines a roadmap for H3S to successfully implement selected changes. We will work with H3S leadership and the Steering Committee to turn recommendations into actionable implementation strategies. We will develop a detailed implementation plan and monitoring tool to capture:

- Description of the goals, desired outcomes, and intended impact
- Impact on equity and service/outcomes disparities
- Actions required for implementation, including timing and dependencies
- Specific strategies to address safety, support, trust, sensitivity, and empowerment for clients and the human services workforce who may have experienced trauma
- Leadership responsibility and accountability
- Metrics and monitoring to measure progress, success, impact, timing, and fiscal impact
- Identified risks or uncertainties and risk mitigation strategies

Our approach to ensuring implementation success and the sustainability of impact is rooted in change management, collaboration, data-driven planning, knowledge transfer, and real-world experience on what works, informed by industry experience and our national consulting perspective (Exhibit 8).

Exhibit 8. Essential Elements of HMA’s Approach

| | |
|--|---|
| <p>■ Collaboration. We will work side by side with the H3S team to ensure the implementation plan reflects the context of your organizational, community, and political realities.</p> | <p><i>We commit to listening when you identify potential barriers and posing options for overcoming those concerns.</i></p> |
| <p>■ Data Driven. We have designed our approach to distill complex strategic, operational, and financial data into actionable insights to decide on the best course of action and set the stage for testing results and monitoring impact. We find that hard data and metrics, agreed upon through collaboration, are the most effective ways to stay on track or identify the need for adjustment.</p> | <p><i>We commit to sharing the methodologies we have used to collect and analyze data to inform monitoring tools.</i></p> |

■ **Rigorous planning.** We cannot predict the future. Instead, we plan as thoroughly as we can for the actions that need to be taken to achieve successful implementation and to account for potential risks or unanticipated barriers. Our assessment process identifies key strategic, operational, and investment factors needed to implement each action and, therefore, sets the stage for designing the steps needed to implement.

We commit to incorporating risk identification and mitigation and contingency planning into the implementation planning process.

■ **Knowledge transfer.** H3S owns the success of this project, and HMA’s process will help ensure your team has the capabilities and tools it needs to support that success. A key component of our implementation planning is identifying where training, capacity building, or tools are needed and providing through knowledge transfer in these areas, when appropriate. For example, you may use components of our data analytics to monitor metrics and impact. You may also find that individuals or groups could benefit from training or mentoring on new responsibilities as programs evolve.

We commit to ensuring your team has the capabilities and tools to support that success by identifying those gaps during the assessment and planning process.

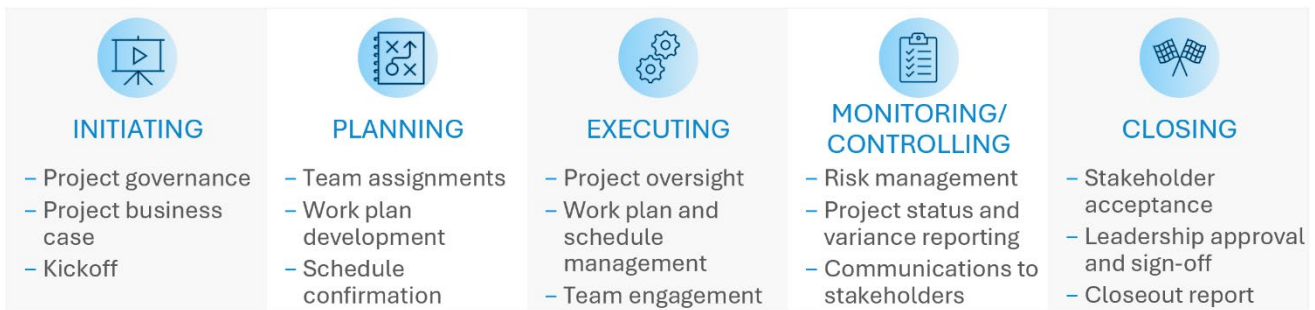
Phase 4 Key Deliverables:

- Finalized department program delivery structure alignment framework
- Operationalized implementation plan for the department program delivery structure alignment framework
- Recommendations for ongoing monitoring
- Project closeout documents and artifacts

Project Management

Strong project management will provide the common foundation across all phases. Our project management approach maximizes the quality and efficiency of our projects by generally following the Project Management Body of Knowledge, and adapting it to meet project and client needs, as displayed in Exhibit 9.

Exhibit 9. Project Management Process



Project Governance to Ensure Communication and Transparency

HMA’s governance framework ensures clear communication, inclusive decision-making, and full transparency throughout the engagement. We will structure the project so H3S leadership and stakeholders have real-time insight into progress and a voice in key decisions, aligning the county’s emphasis on equity, collaboration, and accountability. To this end, we propose a governance structure with the following components:

Steering Committee for Shared Governance – We recommend establishing a joint H3S-HMA Steering Committee to guide the project. This committee will include key internal stakeholders (e.g., H3S division directors, the H3S project manager) and may also involve a liaison from county administration and/or the Board of Commissioners. The Steering Committee will meet on a regular schedule (e.g., biweekly or monthly) to:

- **Review Progress and Findings.** HMA will present interim findings, upcoming activities, and any issues for discussion. This keeps leadership informed in real time and allows for mid-course corrections or focus shifts based on H3S input.
- **Make Collaborative Decisions.** The Steering Committee will make collaborative decisions to guide project priorities and direction, reflecting shared governance. H3S leaders and the project team will decide together, rather than HMA acting alone.
- **Align with County Goals.** The Steering Committee will connect project activities and recommendations to Clackamas County’s equity-driven vision. Cross-division and cross-department representation will foster collaboration and support H3S’s strategic goal of integrated, equitable service delivery.
- **Champion Transparency and Communication.** Steering Committee members will promote transparency by sharing project updates with their teams and relaying staff feedback to leadership. This two-way communication keeps staff informed and ensures leaders address concerns promptly.

A strong Steering Committee is key to transparency and collaboration, ensuring decisions are made openly with input from all relevant divisions. Early and consistent involvement of leadership builds trust and reduces resistance, making stakeholder voices matter. At project kickoff, we will work with H3S to set committee membership, meeting schedules, and decision protocols, all with clear roles and ground rules. This inclusive approach builds consensus, supports the county’s equity goals, and promotes lasting improvements through ongoing collaboration.

Comprehensive Communication Plan and Regular Updates – Effective governance is impossible without a solid communication strategy. At project initiation, HMA will develop a communication plan in partnership with H3S leadership. This plan will map out:

- **Stakeholder Communication Channels.** Identify who should be informed, consulted, or involved at each project stage using the RACI (responsible, accountable, consulted, informed) framework. Examples include routine updates to the H3S director and executive team, periodic briefings to the Board of Commissioners or liaison, and informational updates to H3S staff and key community partners.
- **Frequency and Formats.** Steering Committee meetings will occur monthly, where HMA will share status reports.
- **Transparency Measures.** Following the engagement activities, we will summarize the main themes and share how they may impact recommendations. This process supports transparency and reflects our stakeholder engagement values, ensuring stakeholders see how their input influences project decisions and outcomes.
- **Issue Escalation Process.** We will promptly communicate any concerns or risks to H3S leadership through the Steering Committee or other agreed-upon channels.

A proactive communication plan avoids miscommunication and keeps everyone informed. Our communications remain candid, respectful, detailed, and focused on public value, showing how change benefits the community. This approach supports Clackamas County’s commitment to public trust through open, accountable communication.

Inclusive Decision-Making and Shared Power – In our governance approach, transparency also means inclusivity in shaping decisions. HMA will integrate stakeholder voices into governance in two primary ways.

- **Advisory Inputs to Governance.** As outlined in our stakeholder engagement plan, we will establish a limited-scope Stakeholder Advisory Panel that meets at key milestones. We will share the panel’s recommendations directly with the Steering Committee for consideration before final decisions are made. This sharing ensures those affected by decisions have input into the governance process.
- **Diversity of Perspectives.** We will promote a variety of perspectives in the Steering Committee and governance by including representatives from different divisions, rotating frontline staff, or inviting community members. Doing so early helps build consensus and reduces blind spots. This inclusive strategy supports Clackamas County’s equity goals by giving underrepresented voices a formal role in leadership decisions.

Accountability and Continuous Transparency Mechanisms – To reinforce transparency, HMA will implement governance practices that promote active accountability and keep all parties informed of progress:

- **Regular Status Reports.** We will provide monthly status reports outlining progress, timeline or scope changes, and next steps. Reports will also flag new risks or issues with proposed solutions. For example, if stakeholder interviews are delayed, we may suggest revising the schedule to stay on track.
- **Issue Resolution and Escalation.** Issue resolution will follow a clear governance process—we will address minor issues immediately and escalate major concerns to the Steering Committee or executive sponsor. We ensure transparency by discussing obstacles openly and documenting decisions for accountability.
- **Transparent Decision Log.** We will keep a simple record of major decisions, noting what was decided, the reasons, and who participated.

We prioritize respectful, transparent communication with all stakeholders by acknowledging concerns and emotions, such as staff anxieties, and addressing them directly. By establishing clear governance, HMA ensures effective, accountable processes that reflect H3S’s goals. This approach smooths the transition from planning to action, minimizes unexpected issues, and strengthens future communication and governance, enhancing trust and collaboration.

Overview of Proposed Work Plan

Exhibit 10 presents a high-level overview of the activities and deliverables by phase. Additional details for each phase are provided throughout the response.

Exhibit 10. Proposed Work Plan

Phase 1: Project Initiation and Kickoff (March–April 2026)

- Hold a project kickoff to confirm the project’s scope, timeline, and project management approach
- Request, collect, and organize data on the H3S organization and scope of services
- Review existing advisory, community, and other board structures and membership
- Outline the stakeholder engagement plan, including participants, purpose of their participation, frequency, and types of communications
- Confirm the project plan, including the proposed Steering Committee and project management processes and protocols, such as meeting frequency, format, and membership

Phase 2: Discovery and Assessment (April–October 2026)

Key activities include:

Quantitative and Qualitative Data Analysis

- Review and analyze three-year trends
- Review available reports and resources
- Identify and summarize key trends and issues
- Conduct stakeholder engagement, including interviews and focus groups
- Synthesize the results and findings
- Develop and conduct a survey (optional task)

Fiscal Modeling

- Develop Excel-based model to run and assess multi-year scenarios

Phase 3: Findings and Recommendations (November 2026–October 2027)

Key activities include:

- Prepare an initial updated landscape of findings and share it with the Steering Committee
- Develop initial recommendations and options, along with a comparative matrix of factors against which they can be assessed
- Present a draft summary of findings and initial recommendations for consideration
- Facilitate a decision-making session

Phase 4: Implementation Planning and Support (July 2027–June 2028)

Key activities include:

- Develop a proposed implementation timeline for short-, medium-, and long-term improvement actions based on initiatives prioritized by the Steering Committee and ongoing feedback
- Develop and present the final deliverables

Stakeholder Engagement, Change Management, and Internal Capacity Building

Stakeholder Engagement

HMA's stakeholder engagement approach is inclusive, equity-driven, and grounded in H3S's mission to "lead and learn with equity." Our strategy ensures that internal and external voices are meaningfully engaged throughout the process while being mindful of stakeholder time and capacity. We recognize that building trust across community partners through collaboration and transparency is essential to successful implementation and change management. Stakeholders who are given a seat at the table and an opportunity to share their insight can become effective champions of change, while those who are not consulted may become barriers to progress.

To enhance the depth and quality of our engagement, the team will utilize a multi-tiered approach that includes a dedicated Steering Committee, a targeted in-person site visit, a limited-scope Stakeholder Advisory Panel, and a range of flexible engagement methods.

- **Steering Committee for Strategic Oversight** – A Steering Committee comprising internal stakeholders, such as division directors, the H3S project manager, and liaisons from the Board of Commissioners and/or county administration, will meet regularly to provide strategic guidance, review interim findings, and serve as champions of change. In addition, the Steering Committee plays a central role in maintaining momentum, ensuring transparency, and reinforcing internal ownership of the project.

- **In-Person Early Engagement Efforts** – To build trust and gather rich, contextual insights, HMA will conduct a two-day in-person engagement effort within the first four to six weeks of the project. This early, in-person engagement will foster transparency, strengthen relationships, and ensure the assessment is grounded in the lived realities of those who deliver and receive H3S services.
- **Stakeholder Advisory Panel** – To provide structured, ongoing input at key milestones, we recommend establishing a Stakeholder Advisory Panel. This small, diverse group, comprising frontline and supervisory staff, community partners, and community members, will meet virtually throughout the project to review the engagement plan, surface early priorities, validate emerging findings, and provide feedback on feasibility and alignment.

The Stakeholder Advisory Panel will serve in a consultative capacity, offering insights and feedback without assuming decision-making authority. HMA will collaborate with H3S to identify diverse panel members who bring relevant perspectives. This structure ensures that stakeholder input is integrated meaningfully and efficiently while minimizing the burden on participants.

Engagement Values

Our stakeholder engagement approach emphasizes meeting individuals where they are. It provides multiple engagement strategies to maximize accessibility and participation. Our engagement approach is rooted in collaboration, transparency, and equity. Throughout the project, we will clearly communicate the assessment’s purpose and how stakeholders’ input shapes our recommendations. After each round of engagement, HMA will share summaries of feedback received and explain how it informs next steps, creating an ongoing feedback loop that demonstrates accountability and builds public trust.

These core values guide our work are presented in Exhibit 11.

Exhibit 11. Core Stakeholder Engagement Values

| | |
|------------------------------|--|
| Transparency | Leading with transparency through proactive, regular, and direct communication and a willingness to name the “uncomfortable” so we can discuss it |
| Shared Power | Sharing power by acknowledging and naming our personal and professional positionality, as well as identifying and questioning power structures |
| Active Accountability | Practicing active accountability by addressing harms and working toward proactive reconciliation |
| Humanity | Centering humanity by focusing on relationships, showing up with love for one another, seeing the whole person, and remembering we are more than data points |

By engaging stakeholders thoughtfully and authentically through in-person sessions, virtual meetings, and other engagement methods, we gather rich insights and ensure all voices are heard, especially those of frontline staff, community members, and individuals served by H3S. This inclusive process employs culturally relevant engagement tools, centers community experience, and integrates community voice into decision-making at every level. Ultimately, our collaborative approach ensures we conduct the organizational assessment with H3S and its community, not for them, setting the stage for successful implementation and meaningful, equity-driven improvements in public-sector services.

Change Management

HMA will integrate change management best practices throughout the project to ensure H3S can implement and sustain recommendations. Recognizing that H3S is a complex public organization, we will embed change management into the organizational assessment process itself rather than treating it as a separate, resource-intensive activity. This integrated approach ensures that change is supported through clear communication, inclusive engagement, and alignment with the county’s values of transparency, equity, and stewardship. Key strategies include:

- **Early Buy-In and Communication.** As we engage stakeholders, we are simultaneously laying the groundwork for change. We will identify potential change champions in H3S, respected staff or managers in each division, and involve them in shaping and messaging our findings. Regular project updates and transparent messaging will help staff understand the purpose of the assessment and how their input informs recommendations, reducing uncertainty and building trust.
- **Structured Change Framework.** Our team will apply proven change management frameworks (such as Prosci’s ADKAR [awareness, desire, knowledge, ability, and reinforcement] model or Kotter’s 8 Steps) to guide the transition from assessment to implementation. Practically, this means we guide H3S through steps such as building *awareness* of the case for change, fostering *desire* by emphasizing benefits (for staff, clients, and the community), and developing *knowledge* and *ability* with reinforcement via training and pilot implementations. For example, if a recommendation is to realign certain functions across divisions, we might pilot the realignment in one area first, allowing staff to experience improvements on a small scale and provide input before scaling up. This iterative approach fine-tunes the solution and builds confidence among employees as they see that change is working.
- **Empathy and Inclusivity (Trauma-Informed Change).** We understand that organizational change may cause anxiety. H3S’s commitment to being a trauma-informed and resilient organization will guide our approach. HMA will encourage leadership to acknowledge the challenges staff have weathered (especially after pandemic disruptions and fiscal strains) and frame changes in a supportive way. HMA will embed trauma-informed and equity-centered practices into all engagement activities. We will design our interview and focus group protocols to surface concerns, hopes, and readiness for change, ensuring that staff and community voices are heard in a safe, respectful environment. By approaching change with empathy and recognizing employees’ fears and hopes, we help foster a culture where staff feel safe to adapt and innovate. This approach echoes public service values of respect and caring for the workforce that carries out the county’s mission.
- **Leadership and Capacity for Change.** HMA will work together with H3S’s leaders to define clear sponsorship roles and support leaders in communicating the vision for change. Our team’s experience in public-sector transformation allows us to advise on pacing, messaging, and strategies to maintain momentum while honoring organizational change.

Integrating change management ensures that recommendations are actionable and embraced by those responsible for implementation. This approach supports a culture of transparency, shared ownership, and resilience, paving the way for lasting improvements that reflect the values and priorities of Clackamas County.

Internal Capacity Building

A core principle of our project work is to leave the client organization stronger and equipped to sustain change efforts. We will focus on building H3S’s internal capacity so that the department can sustain fiscal and organizational health long after we complete our consulting work. Throughout the project, we will deliberately transfer knowledge, develop staff skills, and co-create tools with H3S teams. This approach ensures that when it is time to implement changes and monitor progress, H3S’s own personnel have the confidence and competencies to lead the charge. We will employ the following key strategies to build internal capacity:

- **Hands-On Involvement.** HMA will involve H3S staff in the process, effectively turning project activities into learning opportunities. For instance, when conducting the fiscal sustainability analysis, we will work side by side with H3S financial analysts to review budgets, model scenarios, and identify cost drivers. This real-world training means staff learn advanced financial modeling techniques by doing, with our guidance. By engaging staff directly in our methodologies, we demystify the process and build local expertise.

- **Training.** HMA will provide targeted training to fill any skill or knowledge gaps related to our recommendations. For example, if we propose a new integrated service model across divisions, we might conduct a change management training for supervisors so that they can smoothly guide their teams through the new model (overlapping with change management support).
- **Development of Tools and Documentation.** An important aspect of capacity building is equipping staff with the right tools. HMA will develop practical tools, such as checklists, standard operating procedures, financial forecasting models, and performance monitoring tools, as part of our deliverables. More importantly, we will tailor these tools with input from H3S staff and train them in their use. By the project’s end, H3S will have a suite of custom tools (and the knowledge to use them) to continue driving efficiency and alignment.
- **Empowering Internal Champions.** In tandem with formal training, we take a mentorship approach to empower internal champions. We will encourage the formation of cross-division working groups for implementation and serve as advisors to them as needed. By gradually transitioning the leadership of tasks to these internal teams during the project, we ensure H3S staff gain experience in leading change. By the time we conclude, these internal champions can continue to spearhead improvements and troubleshoot issues, creating a ripple effect of capacity growth within H3S.

HMA consistently frames equity as a lens applied to every operational and financial decision, rather than a separate workstream.

Applying Equity Principles and Trauma-Informed Approaches

Our methodology ensures we enhance program effectiveness and promote dignity, safety, and equitable outcomes for the diverse Clackamas County community. In our work for counties and other public-sector clients, we specifically ask the following questions as we interpret analytic results and recommend change:

- How do existing or recommended changes to policies, funding flows, and operational practices differentially impact populations by race, income, geography, disability, language access, and lived experience?
- Have we identified and addressed the structural drivers of inequity embedded in operations, such as eligibility rules, referral pathways, workforce allocation, and reimbursement design?
- Have we considered each recommendation in the context of its impact on historically marginalized communities, along with other decision factors, such as cost or timing?
- What disparities are you tracking now? Do you have action plans associated with current disparities you are measuring?

Members of the proposed team are trained in human-centered design and equity-centered organizational transformation, approaching this work with cultural humility. As we assess, design, and plan for organizational change, we consider the impact on equity as a component of every potential initiative.

- During the assessment,** we identify how equity is measured and whether there are disparities that need to be addressed as we consider actions that could be taken.
- During the development of recommendations,** we consider the relative impact on equity: is the purpose of the action to address a disparity, does the action have a measurable impact on equity, or does the action at least not negatively affect equity?
- During implementation planning,** we embed the measurement of impact on equity as part of the implementation success strategy.

Furthermore, we recognize that both clients and the human services workforce are often profoundly affected by trauma. We draw from nationally recognized trauma-informed frameworks, including the Substance Abuse and Mental Health Services Administration’s six key principles, to ensure our program assessments and recommendations promote safety, trust, empowerment, and healing. Like the way we incorporate equity principles, we embed the consideration of the likely impact of any change on clients or workers at every step of our process as a specific success factor. Specifically, our process:

- Identifies structural barriers that limit equitable access, experience, or outcomes
- Aligns the design of programmatic change with community needs and priorities, integrating feedback from H3S and its key stakeholders
- Designs and recommends actions and service models that promote trust, empowerment, and culturally responsive service delivery
- Embeds support for the workforce in implementation planning to mitigate vicarious trauma and enhance trauma-informed service delivery

Our approach ensures change addresses operational effectiveness, fosters healing, strengthens relationships, and reduces inequities across the human services ecosystem.

5.3 Experience with Similar Projects

HMA has substantial experience working with counties nationwide. We have a history of successful, relevant projects in Clackamas County, neighboring Multnomah County, and more broadly throughout Oregon. Our proposed team leaders have real-world experience implementing similar changes as human services leaders in their own county, Olmsted County, Minnesota, prior to joining HMA.

Substantial Experience Working with Counties Nationwide

HMA was formed in 1985 primarily to help states and counties embrace organizational change and prepare for what was then the emerging field of managed care. Over the years, we have focused on hiring talented professionals with decades of public service experience from counties and states to ensure we continue to have practical insight and expertise on trends, issues, and what works in public environments. HMA has substantially expanded its services and clientele over its 40-year history, but our commitment to working with counties and states remains. Of the nearly 300 individual projects we have performed for counties over the last five years, approximately 60 percent relate directly to this project:

i
In the last three years, HMA has been engaged on nearly 300 projects for 125 counties in 26 states.

- Operational and organizational assessment
- Health and human services needs assessment
- Technical assistance and training
- Quantitative and qualitative program evaluation
- Strategic and operational planning
- Financial modeling

History of Delivering Successful, Relevant Projects in Clackamas County

HMA began working with Clackamas County in 2020, completing a three-year strategic plan for the Public Health Division. More recently, we provided technical assistance relating to the county’s consolidated application for Continuum of Care funding and the Notice of Funding Opportunity process. On both projects, we worked closely with county leadership, teams, and other stakeholders, establishing productive relationships and delivering high-quality deliverables. Through the stakeholder engagement and system assessment work we performed on the Continuum of Care project in 2023, we established a baseline of knowledge of H3S systems, providers, and staff focused on housing and homelessness. While we will treat this proposed assessment process with curiosity and no preconceptions, we will have less of a learning curve because of this familiarity.

Relevant Projects in Nearby Multnomah County and Across Oregon

In the last five years, we have completed 16 projects for counties other than Clackamas County and other governmental agencies in Oregon, and we are a preferred vendor for the Oregon Health Authority for Public Health and Other Program Evaluation Services (Exhibit 12).

Exhibit 12. Summary of HMA Projects Across Oregon 2021–2025

| | |
|-------------------------|--|
| Multnomah County | <ul style="list-style-type: none"> ■ Shared Risk and Protective Factor Training and Technical Assistance ■ Joint Office of Housing Services/Housing Services Department: Operational Evaluation, Implementation Facilitation and Support, and Technical Assistance (multiple phases) ■ Operational and Outcomes Evaluation for the Department of County Human Services, Youth and Family Services Division ■ Federally Qualified Health Center Compliance ■ Optimization of Medicaid Financing Strategies and Billing Practices |
| Other Counties | <ul style="list-style-type: none"> ■ Tillamook County Community Health Center Clinical Infrastructure ■ Healthy Columbia Willamette Collaborative Community Health Needs Assessment |

Oregon Health Authority

- Department of Human Services Office of Developmental Disabilities Services Rate Restructuring (multiple projects)
- Department of Human Services Custody Metric Needs Assessment
- Clinical Advisor Consultant
- Public Policy Facilitation
- Coordinated Care Organization 2.0 Value-Based Payment Technical Assistance
- Patient-Centered Primary Care Home Program Clinical Advisor
- United Healthcare-Amedisys Economic Analysis
- Universal Health Plan Governance Board
- Fee-for-Service Medicaid Billing Guide Development

Recent, Relevant Projects in Multnomah County

We are a preferred vendor for Multnomah County, where we have conducted numerous related engagements in recent years. The two counties face similar challenges, and our work there may provide insight into how Clackamas County may want to approach change. We offer details on two specific, recent projects with relevant goals, scopes, and processes that will inform our approach to H3S's project. We have listed Multnomah County as one of our references.

Multnomah County/City of Portland Joint Office of Homeless Services

Operational Assessment, Implementation Facilitation and Support, and Technical Assistance Across Multiple Phases (2023–present)

Team Members Involved: Paul Fleissner, Kate Lerner

Project background and goals. Multnomah County and Portland faced a widespread and visible homelessness crisis. The Joint Office of Homeless Services, their shared agency, is responsible for disbursing hundreds of millions of dollars annually and wanted to ensure they funded impactful programs efficiently while demonstrating clear operational effectiveness.

The work. The county engaged HMA to support its efforts to strengthen homeless services and deliver more consistent, effective, and coordinated outreach and shelter services. HMA sought to understand system challenges, recommend operational improvements, and support the implementation of a sustainable model to ensure funding reached providers in ways that meaningfully impacted homelessness. The project consists of four phases:

“HMA has been invaluable in consulting on some of our more complex projects (community shelter strategy and outreach strategy). Excited to see where we can get in the coming months.”

Daniel Field, Director (retired)
Joint Office of Homeless Services

- **Phase 1:** HMA conducted an operations assessment, reviewed operational processes and effectiveness, evaluated funding and funds flows, identified barriers to timely contracting, and assessed how leadership structures and city-county dynamics affected decision-making. Our team presented practical, actionable operational recommendations to the Board of County Commissioners and the city council during a joint public session.
- **Phase 2:** HMA provided community engagement support for the county's shelter strategy.
- **Phase 3:** HMA conducted an in-depth evaluation of the county's outreach model and recommended a countywide geographic model assigning providers to seven service areas to align resources with need, reduce duplication, and provide clearer standards and expectations for outreach activities.
- **Phase 4:** HMA is currently conducting an implementation review to understand how program changes are functioning and develop recommendations for next steps, as needed.

Outcomes. The county has successfully launched a new geographically aligned outreach model, which is an important shift that requires changes to contracts, culture, and long-standing provider norms. The model positions the county to reach more people with the resources available, even as tax revenue is projected to decline. Early implementation indicates:

- Providers have adopted the new structure and are working within their assigned geographies
- The county has clearer operational expectations and improved consistency across providers

- Staff and leadership have a more coordinated framework for managing outreach performance
- The community is beginning to see the benefits of the changes

Relevance. Over more than two years and four phases of work, HMA collaborated with the county to evaluate, redesign, and implement a significant human services program, successfully building strong relationships with county leaders while navigating leadership transitions, operational challenges, and significant budgetary pressures.

Multnomah County

Optimization of Medicaid Financing Strategies and Billing Practices (2025–present)

Team Members Involved: Sarah Oachs

Project goals. To provide the most impact for its residents in a fiscally sustainable manner, the county wanted to maximize its Medicaid revenue for services, improve billing practices across county departments, develop and implement a strong Medicaid compliance program, and explore partnership opportunities with service providers to expand reimbursable services.

The work. This work is in its early stages. To date, HMA has inventoried the county’s Medicaid-reimbursable services and prioritized each based on potential revenue impact, ease of implementation, and alignment with strategic goals. We will conduct a comprehensive environmental scan and financial opportunity assessment tailored to the county’s structure, service portfolio, and funding streams. We will review current billing practices, documentation, provider contracts, and Medicaid enrollment data to determine services currently not reimbursed, under-reimbursed, or inconsistently billed. Based on this analysis, we will identify opportunities to improve Medicaid reimbursement and the department’s readiness to accommodate change: billing operations, staffing capacity, information technology infrastructure, and provider engagement. Our work will result in a phased implementation plan to balance quick wins with longer-term system improvements. We will also develop guidance on policies and procedures to enhance compliance and billing practices.

Relevance. This revenue and funding maximization work mirrors questions H3S has asked with respect to opportunities to improve its Medicaid reimbursement, as you contemplate service integration and alignment to meet existing or emerging needs.

Proposed Team that Implemented Similar Changes in Minnesota

Paul Fleissner, project director, and Sarah Oachs, project manager, led a similar process assessing, designing, and implementing the realignment and integration of services within Olmsted County, Minnesota, home to nearly 165,000, and including the City of Rochester.

Paul began working in Olmsted County government in 1993 and served as the deputy county administrator from 2018 to 2020. In this capacity, he led the service integration of public health, public assistance, corrections, social services, and veterans services. Sarah joined Olmsted County in 2012 and served as Health, Housing, and Human Services administrator between 2017 and 2022. She worked closely with Paul during service integration, with a focus on administrative and operational alignment, change management, and monitoring.

They have since used this experience to lead similar successful projects in counties and states across the nation, applying the valuable on-the-ground lessons they learned with humility and flexibility. The following case study details the lessons learned from that experience, which drives their passion for helping other counties achieve similar goals.

Track Record of Similar Projects Around the Country

Our consultants typically come to HMA with a substantial previous career in government or industry; we currently have nearly 70 consultants who worked previously in state agencies and more than 45 with experience in country government. Our teams have used this background to help counties around the country consider service realignment, integration, and funding for their health and human services functions. In recent years, we have seen numerous counties reconsider the way they provide human services as funding tightens and needs increase – alone, integrated with health services, or partnered with other counties. We highlight several projects with direct relevance to components of H3S’s project.

Steele County, Minnesota

Human Services Department Establishment (2025–2026)

Team Members Involved: Paul Fleissner, Sarah Oachs, Kate Lerner

Project goals. Steele County determined it needed to establish its own human services department and separate from a three-county human services coalition to improve its service delivery and better meet the needs of its residents. The county needed an assessment of its current services and practices, a redesigned model of service delivery, and a plan for implementation within a year.

The work. Steele County engaged HMA to review current caseloads, practices, and funding to lay the groundwork for developing program requirements for health services, economic assistance, social services, housing assistance, food assistance, employment services, public health initiatives, rehabilitation services for disabilities and recovery, and community development. To prioritize and plan each prevention-focused and evidence-based initiative, we considered needs for staffing, funding, contracting, information technology, other required resources, providers, and key partners, with a goal of maximizing impact, equity, and future flexibility within available funding. We built recommendations for monitoring and reporting into the plan.

Relevance. Steele County went through a successful, structured process of visioning and assessing potential service models, grounded in equity principles, a human services value framework, and a series of operational considerations similar to those we would expect to use for H3S. The transparent, collaborative process provided hard facts to support decision-making and built consensus among stakeholders to support successful change management.

Exhibit 13. Selected Relevant Projects

Gwinnett County, Georgia, Department of Community Services Human Services Needs Assessment and Strategic Plan (2022–2023)

Team Member Involved:
Paul Fleissner

Description: Assessment to develop a shared understanding of human services needs, infrastructure, and effectiveness to inform strategic planning, with goals to improve equity through increased coordination and collaboration across its care system

Relevance: Followed a process similar to the proposed work plan, including gathering robust quantitative and qualitative data, obtaining insights from a lively community engagement process, and building consensus across diverse internal teams, all of which will be useful to H3S's project

King County, Washington, Public Health Sustainability Analysis of County Public Health Centers (2023)

Team Members Involved:
Paul Fleissner, Sarah Oachs

Description: Assessment of opportunities to improve funding, infrastructure, and processes paired with insights from stakeholder focus groups to inform the development of proposed equity-focused public health models as part of a larger strategic planning and community engagement initiative

Relevance: Provided similar assessment services to the proposed work plan, emphasizing fiscal sustainability with a critical focus on improving equity; used thoughtful engagement processes (focus groups and listening sessions) to improve community engagement and foster successful change management for staff

Orange County, California, Health Care Agency Mental Health Program Assessment and Funding Analysis (2023–2024)

Description: Data-driven assessment of current Mental Health Services Act program performance, funding, and strategic alignment, based on a mixed-methods approach and interacting with numerous internal and external stakeholders to provide insight on the effectiveness of monitoring, opportunities to improve performance, and future funding priorities

Relevance: Conducted a similar mixed-methods assessment to the proposed work plan, with a focus on future funding plans, priorities, and substantial stakeholder engagement activities

Service Integration in Olmsted County

The integration efforts and lessons learned from service integration in Olmsted County provide valuable experience that will directly benefit H3S.

Before joining HMA, proposed team members Paul Fleissner and Sarah Oachs worked with Olmsted County (Minnesota) to help realize its vision:

Create a unified, person- and family-centered service delivery model to maximize high-quality support for clients and the community, supported by an efficient, effective administrative structure that reflects outstanding stewardship of public funding.

The drivers for integration efforts, the project goals, and the tools utilized are detailed below.

| Drivers for Integration | Project Goals |
|--|---|
| Racial and ethnic disparities in outcomes | Reduce racial and ethnic disparities by eliminating structural barriers |
| Fragmented, siloed services that force present navigation challenges for clients | Shift the burden for navigation of siloed services from clients to the department |
| Growing community needs and emerging service gaps | Justify and right-size services to maximize outcomes and client experience |
| Internal workforce and systems inefficiencies | Support service delivery with efficient, effective administrative functions |

Paul and Sarah thoughtfully structured the assessment, design, and implementation of the service integration using innovative tools and techniques that supported successful implementation:

| Tool and Technique | Value to the Project |
|--|---|
| Adopted the Human Services Value Curve | Provided a consistent lens to guide transformation, focused on compliance, collaboration, integration, and generational outcomes |
| Participated in a Harvard learning cohort on building integrated, equity-focused human services models | Obtained insight from the brightest minds in human services nationally and allowed for the creative vetting of ideas |
| Incorporated human-centered design principles, including journey maps and targeted focus groups | Engaged staff, clients, and the community to obtain insight, provide transparency, and foster buy-in and collaboration |
| Created a “team of department champions,” including frontline staff | Obtained diverse insight and context while building enthusiasm and minimizing eventual implementation barriers |
| Supported all analysis, decision-making, and monitoring with data | Discovered and monitored important metrics (disparities, cost, placement rates, process and systems bottlenecks) while providing an accurate basis for measuring impact |
| Implemented rapid-cycle testing | Adjusted programs when outcomes suggested additional room for improvement |
| Reflected candidly on potential organizational barriers to success | Allowed leadership to identify and address structural departmental barriers (systems, processes, people) |

The **RESULTS** of the service integration project on outcomes and disparities were substantial, even while maintaining budget discipline through rising needs and occasional funding cuts. Examples of impact include:

- Improved child welfare placement rates for children of color on par with White children—a rare achievement nationwide
- Reduced juvenile detention racial disparities by half after analyzing violation patterns and changing probation practices
- Improved client experience and outcomes for key client populations, focusing on youths involved in juvenile justice and high-risk mothers and children in poverty
- Enhanced service efficiency by reducing duplication and gaps across services, integrating budgets, and aligning leadership to reduce friction and silos
- Improved housing stability by reducing administrative barriers to obtaining housing and implementing new supportive housing options

LESSONS LEARNED from the experience in Olmsted County have formed the basis for use with HMA clients in similar situations to promote better outcomes:

- Leadership alignment is critical; you cannot be afraid to ask the hard questions about potential barriers in your department
- Accurate, well-analyzed data is critical to avoid relying on perceptions and anecdotes to make decisions and monitor progress
- Journey mapping and listening to those with lived experience was an essential part of understanding and solving for barriers the department would otherwise not have discovered
- Service integration is primarily behavioral and cultural; it cannot be accomplished by systems and process change alone
- Implementation most likely has to be phased; not everything can be achieved at once, but system gaps do not have to impede progress

5.4 Proposed Cost

HMA proposes working on a time-and-materials basis with a not-to-exceed cost of \$249,500, which includes \$3,700 in travel expenses. This amount includes the complete cost of doing business with HMA, including indirect costs such as overhead, general, and administrative costs. HMA anticipates four people traveling on-site for a two-day meeting. Our proposed cost includes labor and expenses related to this anticipated travel.

HMA based our proposed work plan and associated cost on our understanding of what H3S needs from the RFP. We included several optional items we believe will enhance the process and long-term sustainability of the changes. We are happy to discuss and adjust the scope to ensure we meet your needs while minding your budget expectations.

Exhibit 14. Proposed Cost

| Budget Item | Total Cost |
|---|------------------|
| Ongoing Project Management and Phase 1: Project Initiation Kickoff | \$56,000 |
| Phase 2: Discovery and Assessment | \$106,000 |
| Phase 3: Findings and Recommendations | \$62,500 |
| Phase 4: Implementation Planning | \$25,000 |
| TOTAL | \$249,500 |

5.5 Qualifications of the HMA Team

HMA's team includes staff members with demonstrated experience in both leading human services agencies and assessing them as part of consulting engagements. What sets HMA apart from other consulting firms is our dedication to working with publicly funded healthcare and human services, and our team of professionals with years of real-world experience in state and/or local government. More specifically, we have:

- Extensive human services experience addressing disparities among underserved populations
- Project team members with direct, relevant experience implementing similar change efforts prior to joining HMA
- Expert context and knowledge from our local-based team members and partners
- Real-world expertise with organizational assessments and a dedication to stakeholder, participant, and community engagement
- Direct experience building enhanced cultural competency in systems

Team Roles and Qualifications

★ Project Leadership



Paul Fleissner, a senior principal from Minneapolis, will serve as project director. He brings nearly three decades of leadership experience in Olmsted County (Minnesota), including his tenure as deputy county administrator. Paul founded and led the Health, Housing, and Human Services Department, where he successfully integrated the Housing and Redevelopment Authority with public health, public assistance, behavioral health, social services, corrections, and veterans services into a unified, high-performing, and sustainable system. He is a county health, housing, and human services leader with over 40 years of experience building integrated services focused on equity. He is also a social worker with an accounting degree, who has a proven track record of balancing budgets and building innovative service ecosystems.



Sarah Oachs, MHA, LSSBB, will serve as the project manager. She served as the division administrator for the Olmsted County Division of Health, Housing, and Human Services. She oversaw multiple departments, established and managed budgets, directed human services, and advised executives to ensure integrated, high-performing operations. Sarah is a human services professional with more than 25 years of experience with public-sector and community-based organizations. She is an organizational effectiveness and continuous improvement practitioner, Certified Lean Six Sigma Black Belt, and former Malcolm Baldrige Performance Excellence evaluator. Sarah will also serve as the **administration and operations workstream lead**.

★ Workstream Leads



Kate Lerner, MA, CPPM, will serve as the **policy, best practice, and process improvement lead**. In her prior role as director of operations for Dakota County, Minnesota Community Services Division, she oversaw cross-divisional administrative operations and strategic management, with a focus on integrating service delivery.



Boyd Brown, JD, will serve as **engagement lead**, bringing over 20 years of leadership in behavioral health and housing. He specializes in integrated service delivery for individuals facing homelessness, mental illness, and substance use. Boyd is an experienced stakeholder engagement facilitator, known for collaborating with state and local governments, people receiving public services, and community organizations to co-design equitable, trauma-informed, and sustainable solutions.



David DiGiuseppe, MHS, will serve as the **finance lead**. He consults with counties on financial scenario modeling and department performance improvement projects. Prior to joining HMA, David served as senior vice president of healthcare economics at a Medicaid managed care organization, where his team oversaw an array of strategic initiatives.

★ Subject Matter Experts



Libby Hutter, MPH, is a local behavioral health and long-term care expert with over a decade of executive leadership experience in Oregon’s tri-county region. She has a strong track record in strengthening business, financial, and clinical operations; improving access; and driving performance across the continuum of care, particularly in challenging environments. Her expertise includes workforce and organizational development, revenue cycle management, new service line and program development, capacity improvement, and health information technology implementation.



Melissa Corrado, MBA, is a healthcare professional with over 20 years of experience specializing in Federally Qualified Health Center operations, HRSA compliance, grant writing, assessments, training, practice transformation, and strategic planning. Melissa holds an MBA in healthcare administration and a bachelor’s in public health.



Ryan Brown, MHA, MPH, PMP, is a public health professional with over a decade of experience advising public- sector and community-based organizations. His work focuses on organizational strategy, operational effectiveness, and Lean-based continuous quality improvement. He is a certified Project Management Professional and has led complex projects using Agile and traditional approaches.



George Lewis is a community engagement and behavioral health expert who brings lived experience and a recovery-oriented lens to his work. He focuses on helping agencies better support people in recovery and reduce disparities in behavioral health systems. George developed *Bami Sori (Listen to Me)*, a culturally directed healing education workbook designed to support work with Americans of African ancestry, and he trains and mentors therapists and agencies on culturally responsive, recovery-centered care. His work includes developing and delivering training to help white therapists and counselors more effectively serve people of color, as well as facilitating engagement among diverse stakeholders. He previously partnered with HMA on a Minnesota learning cohort to strengthen substance use disorder services statewide by supporting cross-sector dialogue and addressing system inequities.

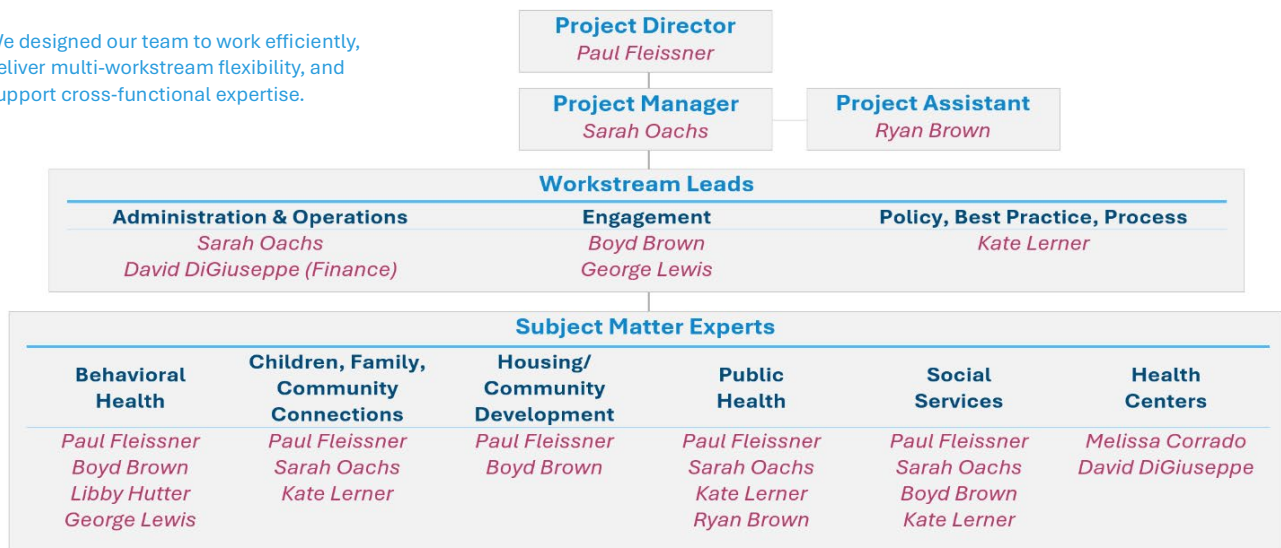


Shannon Brown Joseph, DBA, MBA, CWDP, is a dynamic and accomplished workforce development liaison with experience in federal and state-funded programs, diversity initiatives, and programmatic development. She incorporates diversity initiatives, strategic partnerships, policy development, and programmatic design into talent pipeline creation.

To meet the desired timeline and parallel workflow approach, we have structured our team by functional area to ensure efficiency and effectiveness. This deliberate structure leverages expertise and roles while ensuring consistency in our approach across program areas, as depicted in Exhibit 14 below.

Exhibit 14. Proposed Team Organization and Leadership Structure

We designed our team to work efficiently, deliver multi-workstream flexibility, and support cross-functional expertise.



5.6 Unique or Special Capabilities

HMA was founded on the principle that the best solutions come from those with real-world career experience who have worked to improve healthcare and human services systems in states and communities across the nation. Exhibit 15 summarizes what HMA will bring to this engagement.

Exhibit 15. HMA's Differentiators



Real-Life Experience. Our team brings comprehensive, hands-on expertise—the kind that comes from leading and implementing similar transformations within county systems.



National Perspective. We will bring innovation and practical ideas that have worked in similar situations across the country. For example, we have used the Human Services Value Curve to transform systems in Boulder County (Colorado), Allegheny County (Pennsylvania), Montgomery County (Maryland), and Dakota County (Minnesota).



Approach Based on Lessons Learned. We commit to staying curious during the assessment process, bringing innovative, practical ideas while being guided by the realities of the H3S operating model and culture. We have worked in counties as leaders facing budget challenges, system gaps, workforce limitations, and political priorities and realities. We will leverage this experience as we learn together.



Local Presence and Experience. We bring a mix of local people with knowledge/experience and national expertise regarding best practices. Libby Hutter is a local behavioral health expert who has operated behavioral health hospitals, clinics, and services. She understands the community, and our local office has consultants we can lean on as needed.



Commitment to Equity. We embrace and encourage unique differences in race, color, ethnicity, national origin, sexual orientation, gender identity or expression, age, disability, veteran status, religion, political affiliation, socioeconomic status, and other characteristics.



Lived Experienced Partner. George Lewis has been an active part of enhancing culturally competent services in the Twin Cities metro area. He has spent decades working to enhance the treatment system based on his experience and that of many diverse populations.



Medicaid. A sustainable county budget depends on maximizing Medicaid. Our team has broad, practical experience evaluating Medicaid opportunities and aligning organizational strategy and service models around this essential reimbursement stream.



Good Stewards of Public Funds. Our team has faced the accountability and scrutiny that comes with managing public funds. Our team has been in the seats, having to prioritize services when they all seem critical, and yet we had to make choices. One of the exciting things about this project is that a focus on integration is an opportunity for a big win. In counties where this has been done well, there are efficiencies to be gained and the ability to align dollars and invest them differently when a true commitment to integration is implemented, along with a strong system to monitor the successful implementation of the new model.

5.7 References

The references listed below correspond to projects cited in Section 5.3.

| | |
|--|---|
| <p>Multnomah County Homeless Services Department</p> <p><i>Anna Plumb, MPP</i> <i>Interim Director</i> 209 SW 4th Avenue, Portland, OR 97204 anna.plumb@multco.us 971-352-1286</p> | <p>Long-term client (since 2017)</p> |
| <p>Multnomah County Joint Office of Homeless Services</p> <p><i>Kanoelehua Egleston, MSW</i> <i>Director of Programs</i> 619 NW 6th Avenue, Portland, OR 97209 kanoelehua.egleston@multco.us 503-758-6171</p> | <p>Client since 2023</p> |
| <p>Steele County (Minnesota) Human Services Department Establishment</p> <p><i>Renae Fry, JD, ICMA – CM</i> <i>County Administrator</i> 630 Florence Avenue, Owatonna, MN 55060 renae.fry@steelecountymn.gov 507-444-7431</p> | <p>Newly engaged in the last 36 months</p> |