



### WASHINGTON COUNTY SUPPORTIVE HOUSING SERVICES PROGRAM PARTNER AGENCY CONTRACT

This contract is between Washington County, a political subdivision of the State of Oregon (“County”), and **Open Door Counseling Center (dba Open Door HousingWorks)** (“Contractor”). County and Contractor, in consideration of the mutual promises, terms and conditions provided herein, agree to the following:

#### SECTION 1: PURPOSE AND STANDARD OF SERVICES

- 1.1. This contract sets forth the responsibilities and clarifies the relationship between the County and the Contractor.
- 1.2. Services performed by the Contractor shall be performed to the standards described in Section 29 of the County Contract Terms and Conditions below and Attachment A.
- 1.3. Contractor and County agree that notwithstanding any other terms and conditions included within the Contractor’s proposal, including any Memorandum of Understanding or other document, the County’s general terms and conditions shall apply.

#### SECTION 2: CONSIDERATION

- 2.1 Contractor shall perform the work described in Attachment A, in consideration for which County agrees to pay for the work in the manner as further described in this contract.
- 2.2 There is no guaranteed maximum or minimum level of service or payment established during the contract period. Service and payment terms will be determined through Work Orders. The Contractor shall not be entitled to payment or reimbursement except as authorized through an executed Work Order. All executed Work Orders shall be incorporated into and made a part of the contract as amendments to Attachment A.
- 2.3 Payment rates and terms are set forth and identified in Attachment A.
- 2.4 Unless otherwise stated in Attachment A, the payment terms are thirty days after invoice approval by the County Contract Administrator.

#### SECTION 3: CONTRACT TERM

- 3.1. The effective date is July 1, 2023, or upon final signature, whichever is later.
- 3.2. The expiration date is June 30, 2024, unless otherwise amended.
- 3.3. Passage of the contract expiration date shall not extinguish or prejudice the County's right to enforce this contract with respect to any default or defect in performance that has not been cured.

#### SECTION 4: ADDITIONAL DOCUMENTS AND ATTACHMENTS

- 4.1 The following documents are incorporated into this contract:  
Solicitation # 2021.051PQ.



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Contractor's response dated \_\_\_\_\_.

4.2 The following Attachments are incorporated into and made a part of this contract:

- Attachment A: Statement of Work/Schedule/Payment Terms
  - Attachment A-1: Work Order
  - Attachment A-2: Program Standards
  - Attachment A-3: Budget Allocation
  - Attachment A-4: Statement of Work
  - Attachment A-5: Special Conditions
- Attachment B: Modifications to Contract Terms and Conditions
- Attachment C: Insurance Requirements Summary Form
- Attachment D: Federal Certifications
- Attachment E: State Insurance Program Requirements
- Attachment F: Business Associate Agreement
- Attachment G: PREA Policy Agreement
- Attachment J: Catalog of Federal Domestic Assistance
- Attachment K: Metro Requirements
- Attachment Other: Prevailing Wage Standards
- Attachment Other \_\_\_\_\_

4.3 In the event there is a conflict between the documents comprising this contract, the following order of precedence shall apply: the terms and conditions in the body of this contract, as modified by Attachments A and B, Attachment C, Attachment D, Attachment E, Attachment J and Prevailing Wage Standards; the remaining attached items checked in section 4.2; the Solicitation; and Contractor's response.

## SECTION 5: COUNTY CONTRACT ADMINISTRATOR

Contract Administrator Name: Katherine Galian

Telephone: (503) 846-4760

Email: katherine\_galian@washingtoncountyor.gov

Address: 161 NW Adams Ave, Suite 2000

Mailstop: 63

City/State/ZIP: Hillsboro, OR 97124



## STANDARD CONTRACT TERMS AND CONDITIONS

1. **Subcontracts and Assignment.** 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, without the prior written notice to County. County shall have 10 working days to object. The provisions of this contract shall be binding upon and shall inure to the benefit of the parties hereto, and their respective successors and assigns, if any.
2. **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.
3. **Written Notice.** Any notice of change, termination, or other communication having a material effect on this contract shall be upon the County Contract Administrator and the Contractor Contact Person and served in one of the following manners: a) In-person delivery; or b) deposited in the U.S. Mail under certified or registered handling, postage prepaid. Except as provided in this contract, it is agreed that fifteen calendar days shall constitute reasonable notice for the exercise of any right in the event that applicable law specifically requires such notice.
4. **Governing Law/Venue/Attorney Fees.** This contract shall be governed by and construed in accordance with the laws of the State of Oregon without regard to principles of conflicts of law. Any claim, action, suit or proceeding (collectively, "Claim") between County and Contractor that arises from or relates to this contract shall be brought and conducted solely and exclusively within the Circuit Court of Washington County for the State of Oregon; provided, however, if a Claim is brought in a federal forum, then it shall be brought and conducted solely and exclusively within the United States District Court for the District of Oregon. **CONTRACTOR, BY EXECUTION OF THIS CONTRACT, HEREBY CONSENTS TO THE IN PERSONAM JURISDICTION OF SAID COURTS.** Each party shall be responsible for its own costs and attorney fees for any claim, action suit or proceeding, including any appeal.
5. **Remedies Cumulative.** All rights and remedies of County and Contractor shall be cumulative and may be exercised successively or concurrently. The foregoing is without limitation to or waiver of any other rights or remedies of County according to law.
6. **Severability/Waiver.** County and Contractor agree that, 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. The failure of either party to enforce any provision of this contract shall not constitute a waiver by that party of that or any other provision of this contract.
7. **Public Contracting Statutes.** ORS 279B.220 through 279B.235 and 279C.500 through 279C.870, as applicable, are incorporated herein by reference.
8. **Independent Contractor.**



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- 8.1 Contractor shall perform the work required by this contract as an “Independent Contractor.” Although County reserves the right to determine the delivery schedule for the work to be performed and to evaluate the quality of the completed performance, the County cannot and will not control the means or manner of the Contractor’s performance.

The Contractor shall comply promptly with any requests by County relating to the emphasis or relative emphasis to be placed on various aspects of the work or to such other matters pertaining to the work under this contract. Contractor is responsible for determining the appropriate means and manner of performing the work.

- 8.2 Contractor represents and warrants that Contractor is not an employee of the County, is not currently employed by the Federal Government, meets the specific independent Contractor standards of ORS 670.600, and is not an “officer”, “employee”, or “agent” of the County, as those terms are used in ORS 30.260 et. seq.
- 8.3 Contractor is solely responsible for payment of any federal, state or local taxes applicable to any payments paid to Contractor under this Agreement including, but not limited to, payment of the corporate activity tax imposed under HB 3427 (2019 Oregon legislative session). Contractor may not include its federal, state or local tax obligations as part of the cost to perform under this Agreement. Contractor is not eligible for any federal Social Security, unemployment insurance, or workers’ compensation benefits from compensation or payments paid to Contractor under this Agreement.
- 8.4 Contractor agrees to immediately provide County notice of any claim made against Contractor by any third party. Contractor also agrees not to assign to any third party, without County’s written consent, any obligation of Contractor to indemnify County for any actions under this contract.

9. **Environmentally Preferred Products/Material Safety Data Sheets.** Whenever possible, the Contractor should use environmentally preferable products which present a lesser impact to the public health and the environment than competing products. Contractor agrees, upon execution of this contract, to submit a copy of the relevant material safety data sheet(s) for any chemical substance the Contractor will bring on to the County’s premises and use as part of the work described in this contract.

10. **Nondiscrimination.** No person shall be denied or subjected to discrimination in receipt of the benefits of any services or activities made possible by or resulting from this contract on the grounds of race, color, religion, gender, sexual orientation, national origin, disability, age, or marital status. Any violation of this provision shall be considered a material defect and shall be grounds for cancellation, termination or suspension in whole or in part by the County.

11. **Termination.**

- 11.1 This contract may be terminated under the following conditions:
- a. By mutual consent of both parties.
  - b. Contractor may terminate this contract upon a material default of County; however, Contractor must provide written notice to the County Contract Administrator and provide County with thirty days to cure the default.
  - c. County may at any time terminate, the whole or any part of, this contract for default if Contractor fails to perform any of the provisions of this contract, or so fails to pursue the work as to endanger performance of this contract in accordance with its terms, and after receipt of written notice from the County,



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fails to correct such failures within seven calendar days or such other period as the County may authorize or require.

- d. County may terminate this contract immediately upon declaration of bankruptcy by Contractor or Contractor is taken into receivership.

- 11.2 Upon receiving a notice of termination issued by County, Contractor shall immediately cease all activities under this contract, unless expressly directed otherwise by County in the notice of termination.
- 11.3 In the event the Board of Commissioners of Washington County reduces, changes, eliminates, or otherwise modifies the funding for this contract, or if funding from federal, state, or other sources is not obtained and continued at levels sufficient to allow for the purchase of the indicated quantity of services, then County may terminate this contract, in whole or in part, effective upon delivery of written notice to the Contractor, or at such later date as may be established by the County, and Contractor agrees to abide by any such decision.
- 11.4 In addition to its other rights to terminate, either party may terminate this Agreement, in whole or in part, for convenience upon thirty days' prior notice to the other party. During this thirty-day period, each party shall wind down and cease its services as quickly and efficiently as possible, without performing unnecessary services or activities and by minimizing negative effects on the other party from such winding down and cessation of services.
- 11.5 The rights and remedies of each party provided in this section, are not exclusive and are in addition to any other rights and remedies provided by law or under this contract.
- 11.6 If this Agreement is terminated under subsections 11.3 or 11.4, County shall be liable only for payment in accordance with the terms of this contract for services satisfactorily rendered prior to the effective date of termination.
- 11.7 Upon termination, Contractor shall deliver to County all contract documents, information, works-in-progress, and other property that are or would be deliverables had the contract been completed.

- 12. Time is of the essence.** Time is of the essence in Contractor's performance of each and every obligation and duty under this contract
- 13. Force Majeure.** Neither County nor Contractor shall be held responsible for delay or default caused by fire, riot, acts of God, or war where such cause was beyond, respectively, County's or Contractor's reasonable control. 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.
- 14. Compliance with Applicable Law.** Contractor and its subcontractor(s) shall comply with all federal, state, and local laws and ordinances applicable to the work performed under this contract including, but not limited to the following, as applicable: Title VI of the Civil Rights Act of 1964, Section V of the Rehabilitation Act of 1973, the Americans with Disabilities Act of 1990 (Pub L No. 101-336), ORS 659A.142 and all regulations and administrative rules established pursuant to those laws; and all other applicable requirements of federal and state civil rights and rehabilitation statutes, rules and regulations.



- 15. Contractor Certification Regarding Debarment, Suspension, Proposed Debarment and other Responsibility Matters.** The Contractor certifies to the best of its knowledge and belief that neither it nor any of its principals:
- 15.1 Are presently debarred, suspended, proposed for debarment, or declared ineligible from submitting bids or proposals by any federal, state or local entity, department or agency;
  - 15.2 Have within a three-year period preceding this offer, been convicted or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performance of a public (Federal, state or local) contract or subcontract; violation of Federal or state antitrust statutes relating to the submission of offers; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statement, tax evasion, or receiving stolen property;
  - 15.3 Are presently indicted for, or otherwise criminally or civilly charged by a governmental entity with, commission of any of the offenses enumerated in paragraph 15.2 of this certification;
  - 15.4 Have within a three-year period preceding this offer, had one or more contracts terminated for default by any Federal, state or local public agency.
  - 15.5 Are on the list titled “Specially Designated Nationals and Blocked Persons” maintained by the Office of Foreign Assets Control of the United States Department of the Treasury and currently found at: <https://www.treasury.gov/resource-center/sanctions/SDN-List/Pages/default.aspx>
  - 15.6 Are out of compliance with the tax laws of Oregon and all tax laws of political subdivisions of the State of Oregon, including, but not limited to, ORS 305.620 and ORS chapters 316, 317 and 318. Washington County may terminate the contract if contractor fails to comply with any tax laws during the term of the contract.
- 16. Oregon Registration.** If 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 Corporation Division all information required by those agencies relative to this contract.
- 17. Use of County Facilities.** Contractor and its employees or agents shall have the right to use only those facilities of County that are necessary to perform the services under this contract and shall have no right of access to any facility of the County without prior approval of County management. County shall have no responsibility for the loss, theft, mysterious disappearance of or damage to equipment, tools, materials, supplies, and other personal property of Contractor or its employees, subcontractors or agents which may be stored on County premises.
- 18. Counterparts.** This contract may be executed in several counterparts, each of which shall be an original, all of which shall constitute one and the same instrument.
- 19. Warranties.** Contractor represents and warrants to County that: (a) Contractor has the power and authority to enter into and perform the contract, (b) the contract, when executed and delivered, shall be a valid and binding obligation of Contractor enforceable in accordance with its terms, and (c) Contractor's performance under the contract shall be in a good and workmanlike manner and in accordance with the professional standards.
- 20. Records.** Contractor shall maintain all fiscal records relating to this contract in accordance with generally accepted accounting principles. In addition, Contractor shall maintain any other records pertinent to this contract in such a manner as to clearly document Contractor's performance



hereunder. Contractor acknowledges and agrees that County and its duly authorized representatives shall have access to such fiscal records and all other books, documents, papers, plans, and writings of the Contractor that are pertinent to this contract for the purpose of making audits, examinations, excerpts, copies and transcriptions. In addition, Contractor shall permit authorized representatives of the County to perform site reviews for all Services Delivered by Contractor. All such fiscal records, books, documents, papers, plans, and writing shall be retained by Contractor and kept accessible for a minimum of three years, except as required longer by 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. All subcontracts shall also comply with these provisions. If OMB Circular A-133 is applicable to this Agreement, then Contractor shall supply County with Contractor's DUNS Number.

21. **Work Product.** All work products of the Contractor which result from this contract ("the work products"), except material previously and mutually identified as confidential or proprietary, shall be provided to County upon request and shall be considered the exclusive property of the County. In addition, if any of the work products contain intellectual property of the Contractor that is or could be protected by federal copyright, patent, or trademark laws, or state trade secret laws, Contractor hereby grants County a perpetual, royalty-free, fully paid-up, nonexclusive and irrevocable license to copy, reproduce, perform, dispose of, use and re-use, in whole or in part, and to authorize others to do so. Such work products include, but are not limited to: databases, templates, file formats, scripts, links, procedures, materials, training manuals and other training materials, specially created key commands, and any other information, designs, plans, or works provided or delivered to the County or produced by Contractor under this contract.
22. **County Policies.** During the performance of this contract, Contractor shall follow County's Affirmative Action Program which is to promote the objectives of the Equal Opportunity Commission's guidelines as set forth in the Equal Opportunity Act of 1972, Oregon State Laws, legal mandates, and Presidential Executive Order 11246 entitled Equal Employment Opportunity as amended by Executive Order 11375 and as supplemented in Department of Labor Regulation 41 CFR part 60. Contractor shall also follow the County Workplace Discrimination, Harassment and Retaliation Prevention Policy, Workplace Violence Prevention Policy, Smoke Free Campus Policy and Personal Information Protection Policy. All subcontracts shall also comply with these provisions.
23. **Indemnification and Hold Harmless.** Contractor shall defend, indemnify and hold harmless the County, its agents, officers, elected officials and employees from and against all claims, demands and judgments (including attorney fees) made or recovered against them including, but not limited to, damages to real or tangible property or for bodily injury or death to any person, arising out of, or in connection with this contract, to the extent such damage, injury or death is caused or sustained in connection with the negligent performance or willful misconduct of Contractor, or its employee, agents or subcontractors. The County agrees to promptly notify Contractor in writing of any such claim or demand to indemnify and agrees to cooperate with Contractor in a reasonable manner to facilitate the defense of such claim.

Contractor must indemnify, defend, save and hold harmless Metro and its officers, employees and agents from and against any and all claims and losses arising from a tort (as now or hereafter defined in ORS 30.260) caused, or alleged to be caused, in whole or in part, by the negligent or willful acts or omissions of Contractor or any of the officers, agents, employees or subcontractors



of the Services Provider. This provision does not apply if Contractor is a unit of local government as defined in ORS 190.003.

24. **Insurance.** Contractor shall provide insurance coverage and limits as described in the Attachment C Insurance Requirements Summary Form.
25. **Survival.** The terms, conditions, representations, and all warranties contained in this contract shall survive the termination or expiration of this contract.
26. **Amendment.** This contract may only be amended by a written amendment signed by authorized agents of both parties.
27. **Protecting the Federal Government's Interest When Subcontracting with Contractors Debarred, Suspended, or Proposed for Debarment.** The Federal Government suspends or debar Contractors to protect the Federal Government's interests. The Contractor shall not enter into any subcontract in excess of \$25,000 with a Contractor that is debarred, suspended, or proposed for debarment unless there is a compelling reason to do so. The Contractor shall require each proposed first-tier subcontractor, whose subcontract will exceed \$25,000 to disclose to the Contractor, in writing, whether as of the time of award of the subcontract, the subcontractor, or its principals, is or is not debarred, suspended, or proposed for debarment by the Federal Government. A corporate officer or a designee of the Contractor shall notify the Contract Administrator, in writing, before entering into a subcontract with a party that is debarred, suspended or proposed for debarment.
28. **Security of Information**
  - 28.1 The County is required to notify its customers if any electronically stored information or written document that contains personal information has been subject to a security breach. Any Contractor of the County who becomes aware of any potential breach of a document or electronic file containing personal information of client of the County will immediately notify the Contract Administrator, who will work with the County Public Information Officer to notify the affected persons. A breach occurs when any unauthorized individual or entity gains access to personal information or when unintended disclosure of personal information is made, for example loss or theft of a electronic device containing personal information, loss or theft of a paper document containing personal information, unauthorized access to a network containing personal information, or a document containing personal information being sent to the wrong address.
  - 28.2 No County Contractor will print a person's full Social Security Number (SSN) on any document that will be sent through the mail, without a written request from the person whose SSN will be printed on the document, except as required by law. The Contractor will use only the last 4 digits of a SSN on all documents unless there is a compelling business reason to use the entire SSN. If a document contains a full SSN, the Contractor will take steps to protect the document from unauthorized disclosure. Contractors will not provide copies of a document containing a full SSN to anyone other than the person whose SSN is listed on the document, except as allowed by State or Federal law. The Contractor may provide a copy of a document to a third party with the SSN redacted if the document is otherwise allowed to be released. No Contractor will publicly post or display a document containing a full SSN.
  - 28.3 Any County Contractor that collects personal information must develop, implement and maintain reasonable safeguards to protect the security and confidentiality of the





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information. Employees of the Contractor with access to personal information must take reasonable steps to prevent a breach of the information. Reasonable steps include locking file cabinets, monitoring who has access to areas containing personal information, locking computer workstations if leaving the area, and maintaining physical control over files, computer workstations, thumb drives, cds or other media which contains personal information. Contractors must also ensure the proper disposal of documents or other media which contains personal information. Contracting with a document shredding company will be considered proper disposal of paper documents. The Contractor will be responsible for properly disposing of or erasing electronically stored personal information on hard drives, CDs, thumb drives or other devices under their control.

- 29. Performance Standards.** Unless the Contractor is providing architectural, engineering, photogrammetric mapping, transportation planning or land surveying services or related services, as defined in ORS 279C.100, the Contractor must meet the established industry or business performance standards most closely involved in providing the goods or services.
- 30. Remedies.** The consequences of the Contractor's failure to perform the scope of work or to meet the performance standards established by this contract may include, but are not limited to:
- a. Reducing or withholding payment;
  - b. Requiring the Contractor to perform, at the Contractor's expense, additional work necessary to perform the identified scope of work or meet the established performance standards; and
  - c. Declaring a default, terminating the contract and seeking damages and other relief available under the terms of the contract or other applicable law.
- 31. Whole Contract.** THIS CONTRACT CONSTITUTES THE COMPLETE AND EXCLUSIVE STATEMENT OF THE CONTRACT BETWEEN THE PARTIES RELEVANT TO THE PURPOSE DESCRIBED HEREIN AND SUPERSEDES ALL PRIOR AGREEMENTS OR PROPOSALS, ORAL OR WRITTEN, AND ALL OTHER COMMUNICATION BETWEEN THE PARTIES RELATING TO THE SUBJECT MATTER OF THIS CONTRACT



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## SIGNATURES

### **FOR CONTRACTOR:**

**By my signature below, I certify that I am authorized to execute this contract on behalf of Contractor.**

DocuSigned by: <u>Jeremy A. Toevs</u> Authorized Signature	<u>8/10/2023   14:24 PDT</u> Date
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<u>Jeremy A. Toevs</u> Printed Signatory Name	<u>Executive Director</u> Title
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Business Name or DBA(Check Payable to):  
Open Door Counseling Center (dba Open Door HousingWorks)

Address: 34420 SW Tualatin Valley Hwy

City, State, Zip: Hillsboro, OR 97123

Email: jtoevs@odhw.org

CCB Number and/or DUNS Number (if applicable): \_\_\_\_\_

### **Contractor Contact Person:**

Contractor Contact Person: Jeremy A. Toevs Phone: (503) 640-6689

Contractor Contact Email: jtoevs@odhw.org

### **FOR COUNTY:**

DocuSigned by: <u>Marni Kuyf</u> Authorized Signature	<u>8/10/2023   15:39 PDT</u> Date
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<u>Marni Kuyf ACA ACA</u> Printed Signatory Title
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## **ATTACHMENT A**

### **Washington County Supportive Housing Services**

#### **A. Statement of Work**

##### 1. Services

- a. Contractor agrees to provide services as set forth in Work Order(s) attached as amendments to this contract (see Attachment A-1).
- b. To the extent that a Work Order contains additional contract provisions, the Work Order shall control.
- c. Contractor shall not implement any substantive program change or change in method of service delivery that affects the level, scope, or outcome(s) of services funded under a Work Order, or subcontract any part of the services funded in a Work Order, without prior written approval of County.

##### 2. Program Standards

- a. Contractor agrees to provide the above services in compliance with the Washington County Supportive Housing Services Program Standards (“Program Standards”) described in Attachment A-2.
- b. The County reserves the right to modify the Program Standards during the contract term. The parties agree that a formal contract amendment will not be necessary to make changes to Program Standards, so long as the changes do not impact service levels or funding. Any changes will be communicated to Contractors through a written and dated Notice of Changes to Program Standards, and any such notices will become part of this contract and be fully enforceable under the terms of this contract as if fully set forth herein.

##### 3. Program Outcomes

- a. Contractor shall be responsible for tracking and achieving Performance Measures for services provided, as specified in each Work Order.
- b. Contractor agrees to participate with the County in evaluation of contracted services and Performance Measures, and make available all information required by such evaluation process. This includes providing the County with data necessary to verify client counts, service provision, and Performance Measures, if requested.

#### **B. Compensation and Payment Terms**

##### 1. Compensation

- a. County agrees to provide compensation for Contractor’s services according to the terms set forth in each Work Order.

##### 2. Payment terms

- a. Except as otherwise noted in the Work Order, payments under this contract will be made monthly on a reimbursement basis based on receipt of invoices that show expenditures consistent with the terms set forth in the Work Order.

- b. Contractor shall have sole responsibility for submitting required invoices in order to obtain contract payments.

3. Advance payments

- a. Contractor may request an initial advance payment of up to 25% of the total fiscal year budget in each Work Order. The advance payment must be used for actual expenditures authorized in the Work Order and in accordance with the program budget. All expenditures must be documented in accordance with the requirements provided in section C.
- b. Contractors receiving advance payment should still submit monthly invoices for reimbursement, beginning 15 days after the completion of the first month of services. Invoices will be reimbursed monthly until the total fiscal year budget has been spent, in accordance with the terms in the Work Order. Once the fiscal year budget has been spent, invoices must continue to be submitted monthly to document spending of the advance payment amount through the end of the fiscal year (June 30).
- c. Contractor's failure to perform in accordance with the terms of the Work Order shall result in Contractor returning advance funds.

4. Eligible expenditures

- a. Contractor may charge expenditures under this contract only if they are:
  - 1. In payment for services listed in the applicable Work Order;
  - 2. Performed in conformance with the terms in the applicable Work Order.
  - 3. Not in excess of the maximum payable amount under the applicable Work Order.
- b. Reported expenditures shall be supported by properly executed payrolls, time records, invoices, contracts, vouchers, orders and any other accounting documents pertaining in whole or in part to the contract, in accordance with the instructions in section C.
- c. Any costs incurred by the Contractor over and above the Work Order budget shall be at the sole risk and expense of the Contractor. All project monies shall be either obligated or expended within the term of the Work Order unless specifically authorized by the County.
- d. Contractor shall not transfer County funds from one Work Order to another or from one budget category (Staffing, Financial Assistance, or Administrative) to another without a written amendment to the Work Order. Funds may be transferred between line items within budget categories at the Contractor's discretion.

5. Reduction in funding

- a. In the event that invoices from the Contractor indicate to the County that funds are not being utilized and will not likely be utilized efficiently during the term of the Work Order, the County, in its sole discretion, may reduce the Contractor's funding.
- b. In the event that the County determines that funds need to be reduced, County will inform Contractor in writing of the proposed decision to reduce funding at least 14 days before reducing Contractor's funding. Contractor will have 14 days to respond

in writing to the proposed reduction and may provide any information Contractor believes may impact County's decision. After receipt of Contractor's response, County will make a final decision within 4 working days and inform Contractor of the decision in writing.

- c. Funding reductions will only affect funding that has not yet been obligated or expended. Contractor will still be fully reimbursed for funding that has already been obligated or expended in accordance with the terms of the Work Order.

6. Work Order renewal

- a. All Work Order budgets are allocated on a fiscal-year basis, with compensation through the end of the County's fiscal year (June 30).
- b. Work Orders are eligible for renewal on an annual fiscal year basis through the contract term, dependent on Contractor performance, system need and funding availability. Renewal is not guaranteed, and the level of renewal funding may increase or decrease from year to year.
- c. To request renewal for the following fiscal year, Contractor must submit a written request to the Contract Manager by March 31 of the current fiscal year. The request must include written confirmation of the Contractor's request to renew as well as any proposed modifications to the terms of the Work Order for the upcoming fiscal year. In follow up to the renewal request, the Contract Manager will provide the Contractor with additional instructions for submitting budget requests and other required documentation for consideration.

7. Recovery of funds

- a. Any funds spent for purposes not authorized by a Work Order shall be deducted from future payments or refunded to the County at the County's discretion.
- b. Payments by the County in excess of authorized amounts shall be deducted from payment or refunded to the County no later than 30 calendar days after the end of the Work Order term or after notification by the County, whichever is earlier.

8. Withholding of payments

- a. Failure of Contractor to submit required reports when due may result in the withholding of payments. Such withholding of payments for cause may continue until Contractor submits required reports, or establishes, to the County's satisfaction, that such failures arose out of causes beyond the control and without fault or negligence of the Contractor.

**C. Invoices and Documentation**

1. Invoices

- a. The County will provide Contractor with a Purchase Order and Invoice Template at the time of contract execution. All invoices must use the Invoice Template and must reference the Purchase Order number.
- b. Contractor shall email all invoices no later than 15 days after the service is performed or goods received or, if the services are provided on a monthly basis, no later than 15 days into the following month.

- c. Services must be launched no later than 60 days after the execution of each Work Order, with initial invoices submitted no later than 105 days after the execution of each Work Order.
- d. If required invoices are received on time and are complete and correct, payment will be issued within 30 days of approval by the County Contract Administrator.
- e. The County may, at its discretion, withhold payment of the final invoice until all close-out requirements have been met in accordance with work specifications.

2. Supporting Documentation

- a. All invoices must be supported by documentation that meets the requirements in section 3.
- b. All supporting documentation must be complete and accurate at the time invoices are submitted.
- c. Supporting documentation must be available for review upon request in digital format.
- d. The County reserves the right to conduct an audit of Contractor's financial management systems and supporting documentation at any time. If the audit shows insufficient documentation for any Contractor invoices, Contractor will be required to return all applicable funding.

3. Documentation Requirements

- a. Contractor shall document staffing costs with data on the number of clients served, in accordance with the Work Order budget.
- b. Contractor shall document financial assistance costs by recording all expenditures in the County's Homeless Management Information System (HMIS) within three business days of each expenditure.
- c. Documentation of costs which are allocable to more than one line item and/or which are only partially allocable to the project budget shall be annotated with amounts allocated to each source.
- d. Documentation of administrative costs must meet the guidelines in section D5.

**D. Financial Management Standards**

- 1. Contractor shall maintain a financial/administrative system which complies with the standards in the most recent versions of 2 CFR 200 Uniform Administrative Requirements. Contractor shall maintain a separate accounting of all received and disbursed under this contract. All accounting for this contract shall be maintained within the Contractor's primary financial accounting system.
- 2. The Contractor's financial system shall provide effective fiscal and internal controls and accountability for all funds, property, and other assets to ensure they are accounted for and used solely for authorized purposes under the contract. The Contractor's financial systems will be established and maintained in accordance with Generally Accepted Accounting Principles and will be in compliance with all legal and contractual requirements.
- 3. The Contractor's financial system shall:

- a. Allow for aggregation of detailed data to summary level.
  - b. Allow for comparison of budgeted amounts to actual expenditures, including proper charging of costs and cost allocation.
  - c. Contain information pertaining to the contract and any subcontract awards, including but not limited to, obligations, unobligated balances, assets, liabilities, income, expenditures, matching funds, and leverage.
  - d. Provide accurate, current, and complete disclosure of all expenditures, including but not limited to, all revenues and expenditures from other grants, contracts or other agreements related to the contract.
  - e. Allow for the accounting of personnel time by applicable cost codes.
4. Contractor shall create and maintain a written cost allocation plan and/or allocation methodology for all allocated costs charged to this contract. All costs applied to this contract must be in accordance with the requirements of Federal Regulations 2 CFR 200. All cost allocation methodologies and costs pertaining to this contract are subject to County review and approval prior to reimbursement by the County.
5. Contractor shall allocate direct and indirect costs according to the following guidelines:
- a. Direct costs are those costs that can be identified specifically with a final cost objective and that can be directly assigned to such activities easily with a high degree of accuracy. Typical costs charged directly to a contract include the compensation of employees (i.e. employees directly performing the scope of the work) who work under the contract, fringe benefit costs, the costs of materials, and other expenses incurred under the contract.
  - b. Indirect costs are generally classified within two broad categories: "Facilities" or "Administration".

"Indirect Facilities" is defined as depreciation on buildings, equipment and capital improvements, interest on debt associated with certain buildings, equipment and capital improvements, and operations and maintenance expenses.

"Indirect Administration" is defined as general administration and general expenses such as the leasing, rental or maintenance of office space, rental of office equipment, utilities, insurance expenses, office supplies, accounting services, personnel administration expenses, and all other types of expenditures not listed specifically under "Indirect Facilities".

Indirect costs mean those costs incurred for a common or joint purpose benefitting more than one cost objective, and not readily assignable to the contract. To facilitate equitable distribution of indirect expenses to the cost objectives, it may be necessary to establish a number of pools of indirect costs. Indirect cost pools must be distributed to contract objectives on a basis that will produce an equitable result when considering the benefits derived. (24 CFR §200.56).

All indirect costs must be justified by an allowable indirect cost allocation plan and/or allocation methodology.

**E. Program Reporting Requirements**

1. Program reports shall be completed accurately in conformance with the guidelines and directions provided in the Work Order. Program reports which are not received by the time specified or are substantially incomplete or incorrect may result in delayed payment.
2. Contractor grants the County the right to reproduce, use, and disclose all or part of the information provided in the Contractor's program reports.
3. Unless otherwise waived by the Contract Manager, Contractor shall utilize the County's Homeless Management Information System (HMIS), ServicePoint, to record program data according to the requirements in the Program Standards.
4. At the end of each quarter, the County will provide Contractor with an HMIS data report summarizing the Contractor's HMIS data for the quarter. Contractor shall review and verify that the data are accurate within five business days. If data are not accurate, Contractor shall work with the County to correct the HMIS data as needed.

**F. Insurance Requirements**

Contractor shall provide insurance coverage and limits as required by the County. The County may require additional coverage depending on the type of service in each Work Order. Insurance requirements will be established prior to the execution of each Work Order, and the required insurance must be in effect when the Work Order is executed.

**G. Organizational Stability**

Contractor shall report changes in key personnel or their general responsibilities and any other significant changes that may occur within the organization, within 10 business days of occurrence.





# WASHINGTON COUNTY OREGON

6/1/23

Contract Number:

## ATTACHMENT A-1 WORK ORDER

<b>Department</b>	Department of Housing Services
<b>Contractor</b>	Open Door Counseling Center (dba Open Door HousingWorks)
<b>Work Order Term</b>	July 1, 2023 - June 30, 2024

### A. Scope of Work

<b>Program Component</b>	Street Outreach
<b>Number of Households or Units</b>	N/A
<b>Number of component specific full-time case workers</b>	4
<b>Statement of Work</b>	See Attachment A-4.1

<b>Program Component</b>	Hillsboro Congregate Shelter
<b>Number of Households or Units</b>	50
<b>Number of component specific full-time case workers</b>	N/A
<b>Statement of Work</b>	See Attachment A-4.2

<b>Program Component</b>	Central County Alternative Pods
<b>Number of Households or Units</b>	30
<b>Number of component specific full-time case workers</b>	N/A
<b>Statement of Work</b>	See Attachment A-4.2

<b>Program Component</b>	West County Alternative Pods
<b>Number of Households or Units</b>	30
<b>Number of component specific full-time case workers</b>	N/A
<b>Statement of Work</b>	See Attachment A-4.2

<b>Program Component</b>	Inclement Weather Shelter/Resource Team
<b>Number of Households or Units</b>	N/A
<b>Number of component specific full-time case workers</b>	N/A
<b>Statement of Work</b>	See Attachment A-4.2

<b>Program Component</b>	Housing Liaison Services
<b>Number of Households or Units</b>	N/A
<b>Number of component specific full-time case workers</b>	1 – HHS HLS 3 – Shelter HLS
<b>Statement of Work</b>	See Attachment A-4.3

<b>Program Component</b>	Rapid Re-Housing & Homelessness Prevention
<b>Number of Households or Units</b>	60
<b>Number of component specific full-time case workers</b>	3
<b>Statement of Work</b>	See Attachment A-4.4

<b>Program Component</b>	Housing Case Management Services
<b>Number of Households or Units</b>	170
<b>Number of component specific full-time case workers</b>	7 – 20:1 1 – 30:1
<b>Statement of Work</b>	See Attachment A-4.5

<b>Program Component</b>	Quality Assurance
<b>Number of Households or Units</b>	N/A
<b>Number of component specific full-time case workers</b>	1
<b>Statement of Work</b>	See Attachment A-4.7

<b>Program Component</b>	Housing Careers
<b>Number of Households or Units</b>	45
<b>Number of component specific full-time case workers</b>	N/A
<b>Statement of Work</b>	See Attachment A-4.12

<b>Program Component</b>	
<b>Number of Households or Units</b>	
<b>Number of component specific full-time case workers</b>	
<b>Statement of Work</b>	

<b>Program Component</b>	
<b>Number of Households or Units</b>	
<b>Number of component specific full-time case workers</b>	
<b>Statement of Work</b>	

**B. Budget**

<b>Total Budget</b>	\$8,768,593
<b>Budget Allocation</b>	See Attachment A-3 for component specific allocations

**C. Performance Measures:**

<b>Performance Target Details</b>	<b>Target Goal</b>
Providers must regularly monitor data integrity and make data quality corrections as needed. Providers are responsible for maintaining a data quality score of 95% across all required reports outlined in the Data Quality Plan. Regular reports will be provided to monitor Program Specific data integrity.	95%
Providers shall update the service participant's record in HMIS within three business days of any changes	No more than 3 business days
See Attachment A-4 for component specific performance measures	

**D. Reporting:**

<b>Report Type</b>	<b>Frequency</b>	<b>Deadlines</b>	<b>Information Required</b>
Invoice	Monthly	15 <sup>th</sup> of each month	Completed Invoice Template
HMIS data verification	Quarterly	5 business days after receiving HMIS data report from County	Written verification that HMIS data report provided by County is accurate
Narrative report	Annual	March 31	Written report addressing questions provided by the Department of Housing Services (DHS)
Renewal request	Annual	March 31	Written request to renew the Work Order including any proposed modifications to the Work Order terms

**E. Work Order Administration:**

**Department of Housing Services Contract Manager:**

Name: Katherine Galian

Title: Program Manager

Address: 161 NW Adams Ave, Suite 2000, MS 63, Hillsboro, OR 97124

Phone: (503) 846-4760

Email katherine\_galian@washingtoncountyor.gov

**Contractor's Work Order Program Manager:**

Name: Jeremy A. Toevs

Title: Executive Director

Address: 34420 SW Tualatin Valley Hwy, Hillsboro, OR 97123

Phone: (503) 640-6689

Email: jtoevs@odhw.org

## **Attachment A-2**

### **Washington County Supportive Housing Services Program Standards**

Washington County’s Supportive Housing Services Program (SHS) aims to build a countywide system of care to address and prevent homelessness through services and supports that lead to housing stability and equitable outcomes. The SHS program is funded through a regional ballot measure approved by voters in May 2020 and designed to provide housing and wrap-around services to effectively and permanently elevate people out of homelessness. The SHS program is administered by the County’s Department of Housing Services (DHS) in partnership with contracted service providers.

The Washington County SHS Program Standards (“Program Standards”) are contractual requirements which all SHS service delivery partners must adhere to. This document is not a standalone document and is meant to work in conjunction with the requirements in each SHS service delivery partner’s Work Order(s), which may add to, clarify, or supersede any requirements set forth in this document.

#### **1. SHS Program Components**

These Program Standards apply to all contracted SHS services, which include, but are not limited to, the following service types, referred to in this document as Program Components:

- Outreach and engagement
- Shelter and transitional housing
- Housing navigation, placement and eviction prevention
- Supportive housing stabilization services
- Wrap-around supports

#### **2. SHS Populations Served**

All SHS Program Components must serve:

- Population A, defined as people with extremely low incomes, and one or more disabling conditions, and who are experiencing or at imminent risk of experiencing long-term or frequent episodes of literal homelessness; and/or
- Population B, defined as people who are experiencing homelessness or have substantial risk of experiencing homelessness.

All SHS services must also be structured to lead with racial equity by especially meeting the needs of Black, Indigenous, Latino/a/x, Asians, Pacific Islanders, immigrants and refugees. Specific services will also be designed to meet the distinct needs of seniors, children, persons with disabilities, individuals with mental health or substance use disorders, criminal justice involved individuals, households impacted by domestic violence, youth exiting foster care, unaccompanied homeless youth, people who identify as LGBTQ+, women and people living with certain chronic health conditions.

Each SHS service delivery partner’s Work Order(s) identify the specific populations to be served within the eligible SHS populations.

#### **3. SHS Service Geography**

All SHS services must be provided to people experiencing or at risk of homelessness in Washington County. Funded services must be located within the parts of the county that are inside [Metro’s](#)

[jurisdictional boundary](#), however anyone who is homeless in the county is eligible for services in the program, no matter where they may sleep at night.

#### 4. SHS Service Delivery Approaches

All SHS Program Components must practice the following service delivery approaches:

- **Racial Equity:** In order to effectively address homelessness, we must acknowledge and address through our work the continuing role that structural and institutional racism play in causing homelessness among Black, Indigenous, Latino/a/x, Asian, Pacific Islander, immigrant and refugee communities, many of which are significantly overrepresented in Washington County's homeless population as compared with their representation in the county's overall population. Eliminating these disparities requires that resources be targeted and services be delivered in a manner that addresses these disparities, and that individual organizations and the system of care as a whole are accountable for equitable access to services and equitable outcomes.
- **Culturally Specific and Responsive Services:** All SHS service partners are expected to deliver services in a culturally responsive manner. Culturally responsive services are respectful of, and relevant to, the beliefs, practices, culture and linguistic needs of diverse consumer/participant populations and communities. Many service partners are also expected to deliver services that are culturally specific. Culturally specific services are informed by specific communities, where the majority of members/participants are reflective of that community, and use language, structures and settings familiar to the culture of the target population to create an environment of belonging and safety in which services are delivered.
- **Housing First:** Housing First programs focus on quickly moving people experiencing homelessness into permanent housing and then providing the additional supports and services each person needs and wants to stabilize in that housing. Services are never mandatory and cannot be a condition of obtaining the housing intervention. The basic underlying principle is that people are better able to move forward with their lives once the crisis of homelessness is over and they have control of their housing. Stable housing provides a platform from which people can pursue other health, economic, and personal needs and goals.
- **Low Barrier:** All SHS Program Components should prioritize equitable access to services by minimizing barriers to service entry and participation. This includes low-barrier admission policies, low-barrier documentation requirements for program eligibility (including self-reporting options), few to no programmatic prerequisites or housing readiness requirements, supportive services that are voluntary and participant-led, and an emphasis on participant choice and self-determination.
- **Harm Reduction:** As part of the low-barrier design of SHS Program Components, all contracted programs must emphasize a Harm Reduction approach. Programs utilizing a Harm Reduction approach do not terminate assistance based solely on a person's inability to achieve sobriety or because of medication non-compliance. Instead, services focus on assisting the person to reduce the negative consequences of their behaviors, while at the same time assisting them to move into, and stabilize in, permanent housing.
- **Trauma Informed Care:** All SHS Program Components must incorporate Trauma Informed Care practices into their program design and delivery of services, and providers must develop policies and procedures for training staff on Trauma Informed Care practices. Trauma Informed Care is defined as: an organizational structure and treatment framework that involves understanding, recognizing, and responding to the effects of all types of trauma. Trauma Informed Care also emphasizes physical, psychological and emotional safety for both participant and providers, and

helps participants rebuild a sense of control and empowerment. Trauma Informed services consider an understanding of trauma in all aspects of service delivery and place priority on the trauma survivor's safety, choice, and control.

## **5. Utilization of the Community Connect System**

Most SHS Program Components are required to participate in Community Connect, Washington County's coordinated entry system for screening, assessment, referral and housing placement. Community Connect ensures that people experiencing homelessness in the community are connected to services that best address their housing needs and that the available housing and supportive services are used as efficiently and effectively as possible.

All SHS service partners must meet the following requirements unless they are exempt from Community Connect participation by their Contract Manager due to the specific types of services they provide:

- Providers must comply with all applicable procedures in the approved Washington County Community Connect Procedures. The procedures may be subject to change through issued guidance.
- Providers must accept referrals and/or matches from Community Connect, in accordance with any guidance or policies set forth by the County.
- Providers must participate in Community Connect case conferencing and coordination activities as requested.

## **6. Collaborative Requirements**

Washington County aims to build a countywide system of care to address and prevent homelessness through an integrated network of services and supports. All SHS service partners are expected to:

- Partner with other agencies and organizations as appropriate to create service alignment and coordination.
- Contribute to and participate in systemwide meetings and collaborative activities as appropriate.
- Participate in coordinated system planning and implementation.
- Develop and/or maintain relationships with agencies and programs that provide complementary services to facilitate effective referrals and service connections. This includes, but is not limited to, culturally specific services, behavioral health services, peer support services, domestic violence services, physical health services, substance use disorder services, education and employment services, benefits navigation, and legal services.

## **7. HMIS Data Collection and Participation Requirements**

In order to provide well-coordinated support for households and manage the limited resources available in the County, providers must utilize ServicePoint, the County's Homeless Management Information System (HMIS) to track participant-level data.

All SHS service partners must meet the following requirements unless they are exempt from HMIS participation in writing by their Contract Manager, for reasons of participant safety and confidentiality:

- Providers must review and sign all relevant User Policy and Procedures forms developed under the auspices of NW Social Service Connections for the purposes of using ServicePoint.
- Providers using ServicePoint must inform participants of their data privacy rights and post a Privacy Notice in an area clearly visible to agency participants.

- Providers shall utilize ServicePoint to record participant level information as required by current Policies and Procedures, HUD Universal Data Elements (when applicable), and Program Specific Data Elements.
- Providers shall create each service participant's record in HMIS within two business days of the participant's initial screening.
- Providers shall update the service participant's record in HMIS within three business days of any changes. This includes updates to (a) participant's standardized assessment (b) participant's housing status (c) services provided to the participant (d) financial assistance provided to the participant.
- Providers must utilize ServicePoint to manage vacancies, fill vacancies, and manage coordinated access lists.
- Providers must record expenditure of financial assistance funds in HMIS.
- Providers must comply with all data collection and reporting required, which may include contributing to countywide and regional SHS metrics.
- If the program is exempted from participation in ServicePoint, providers shall use an equivalent system to record, track and report on all required data, subject to Contract Manager approval.
- Providers must regularly monitor data integrity and make data quality corrections as needed. Providers are responsible for maintaining a data integrity of 95%. Data integrity includes both HUD standards and Program Specific Data Elements required for reporting. Regular reports will be provided to monitor Program Specific data integrity.

## **8. Health, Safety and Incident Reports**

All SHS service partners must meet the following minimum requirements to protect the health and safety of service participants:

- Providers must comply with all Oregon Administrative Rules that are applicable to the Program Component.
- Providers must have policies and procedures regarding injury and disease prevention within their programs.
- Providers must use a centralized system to document incident reports and an incident report log to track crises, conflicts, accidents, injuries, illnesses, trauma, etc. that occur within any SHS program facilities or programs.
- Incidents related to the suspicion of abuse or neglect of a child, a mentally ill or developmentally disabled adult, or an elderly person must be immediately reported to the statewide Abuse Reporting Hotline (1-855-503-SAFE). Providers must also notify their Contract Manager within 12 hours of the incident.

## **9. Participant Grievance and Termination Policies and Procedures**

All SHS service partners must provide service participants with written information about program policies and procedures related to participant grievances and termination, in accordance with the following guidelines:

- Providers must establish a system of written procedures through which a service participant or their family member may present grievances about the operation of services. Providers shall make grievance processes readily accessible and available and shall provide information about the grievance procedure when requested. Providers must keep a record of all grievances received and must make grievances available to the Department of Housing Services upon

request. Providers must provide a written response to all grievances that includes information on how a participant can appeal a decision pertaining to their grievance.

- Providers must establish written termination and/or exclusion policies that appropriately protect the interests of service participants by (a) applying a trauma informed and equity lens to evaluating rule violations; (b) imposing sanctions short of termination wherever reasonably possible; (c) informing participants in clear terms of the reason for their termination and/or exclusion from a program; and (d) providing a process for grieving the decision. Except in extreme situations, termination and exclusion policies should allow for future re-entry into services under appropriate conditions.

## **10. Non-Discrimination**

All SHS service partners must adopt policies that ensure that services are open and accessible to all eligible participants. This includes, but is not limited to, compliance with the following minimum non-discrimination requirements:

- Providers must not discriminate against participants regarding the provision of ongoing services or enrollment in any services based on race, ethnicity, religion, national origin, disability, sex, gender identity, age, sexual orientation, marital status, or familial status.
- Providers must comply with all Federal, State, and local laws, rules and regulations related to nondiscrimination, including but not limited to the Fair Housing Act, Americans with Disabilities Act, Violence Against Women Act, Civil Rights Act, and Age Discrimination Act.
- All SHS Program Components must be provided free of charge to all participants and may not require participant savings plans, unless approved in writing by the Contract Manager.

## **11. Equal Access and Gender Identity**

All SHS service partners must ensure all persons have equal access to services provided in a manner that is consistent with their gender identity, in accordance with the following guidelines:

- Providers must ensure all persons who are eligible to receive services are served within a facility that serves the gender with which that person identifies. This right is absolute, regardless of sex assigned at birth, and regardless of whether they have undergone medical treatment to align their physical bodies with their gender identity. Persons who do not identify as male or female have the right to be served wherever they feel safest. Facilities that are legally permitted to segregate participants by sex must serve all participants who identify with that gender.
- Service providers may not ask for proof of gender, nor may they require that a person's gender match the sex listed on legal documentation. Providers may not deny services to participants because their appearance or behavior does not conform to assumed gender stereotypes.
- Providers must ensure all persons receiving services have access to bathrooms consistent with their gender identity and the right to safety and privacy.
- Providers must ensure all persons receiving services have the right to be referred to and addressed by the name and/or gender pronouns with which they identify (including in HMIS participant records), regardless of the name and gender marker on their identity documents.

## **12. Language Access**

All SHS service partners must have a language access policy that will ensure that verbal and written materials can be provided for participants in the appropriate language.



- When a participant's primary language is other than English or the individual is hearing impaired, information must be provided through written materials in the appropriate language and/or through use of an interpreter in the language the individual understands.
- Providers can utilize interpretation services from a third-party contractor funded by the Department of Housing Services for Washington County SHS services, or providers can access interpretation services independently and receive reimbursement.
- Providers can utilize written translation services coordinated and funded by the Department of Housing Services for Washington County SHS services. Written translation services accessed independently are not eligible for reimbursement.
- Providers may utilize an interpreter provided by the individual (e.g. a relative or friend), if the individual requests the use of a family member or friend. The use of minors as interpreters is strongly discouraged, except in emergency situations or at the individual's request.

### **13. Facilities**

All SHS service partners must provide SHS services in clean, safe, and well-maintained facilities that comply with the following minimum requirements:

- All sites providing services to participants must meet all applicable inspection requirements and receive all applicable permits.
- Service sites are subject to review at any time by the Department of Housing Services or any other County Department. Any concerns or findings around site cleanliness or safety from any County Department(s) must be corrected within the timeframe prescribed.
- Providers must ensure all program facilities comply with the Americans with Disabilities Act Standards for Accessible Design.
- All program rules, grievance and termination procedures, privacy notices, and other required notices must be posted in plain sight in a common area of the service facility.

### **14. Personnel**

All SHS service partners must meet the following guidelines for any personnel working in the SHS program:

- Providers must ensure that employees are adequately trained to carry out their roles in alignment with the Program Standards.
- Providers must provide or coordinate access to training programs for all new employees and continuing in-service training for all employees who interact with participants in the context of their daily work.
- Providers must ensure appropriate staff participate in all required SHS program trainings and shared learning communities.
- Providers must ensure that service delivery is not interrupted during periods of personnel change.
- Providers must ensure that staff salaries align with funding allocations.
- Providers must have established processes to gather feedback from staff on service operations at least annually.
- Providers must have procedures to allow staff to report suspected organizational fraud or abuse to the County and must communicate those procedures clearly to staff.

## **15. Customer Service**

All SHS service partners must demonstrate high standards of customer service and accountability to service participants. This includes implementing established processes to secure feedback from participants regarding their experiences with the program and service operations. Providers must have policies and procedures to ensure participant feedback is anonymous, confidential and optional. Participant feedback should be gathered at least annually and should be made available to the Department of Housing Services upon request.

## **16. Service Animals**

Service animals play an important role in ensuring the independence of persons with disabilities, and SHS service partners are therefore expected to welcome any animal trained to assist a person with a disability. This also includes emotional support animals that help individuals with psychiatric disabilities to manage the symptoms of those disabilities by providing therapeutic nurture, comfort and support.

SHS service partners are expected to:

- Make reasonable accommodations or reasonable modifications to their programs to allow individuals with service animals or emotional support animals to participate. Decisions to refuse the accommodation of a service animal must be documented and maintained in participant files.
- Permit the service animal to accompany their handler to all areas of residential housing programs, including the dining room and restroom.
- Require the service animal to always be under the participant's control. Supervision of the service animal is the responsibility of the participant.
- Develop policies for corrective action or removal of a service animal as necessary for reasons of health, safety or disruption of the program.

## Attachment A-3 Budget Allocation

Programming Funding Year 2023/2024

<b>Component - Street Outreach</b> (See Attachment A-4.1)	
Staffing and other Staff Related Costs (Case Management, Management, Mileage, Office space, phone, computer, etc)	\$459,999
Minimum Number of Program Specific Workers	4
Financial Assistance (Supplies, Move-in, stabilization, retention)	\$72,000
Available Administrative	\$63,840
<b>Total Allocation</b>	<b>\$595,839</b>

<b>Component - Hillsboro Congregate Shelter</b> (See Attachment A-4.2)		
	Each bed/Unit a Day	Total Amount
Rate	\$87	\$1,592,100
Special Conditions Shelter Capacity		\$0
Total Allocation includes administration rate		\$1,592,100
Number of Units		50

<b>Component - Inclement Weather Shelter/Resource Team</b> (See Attachment A-4.2)		
	Each bed/Unit a Day	Total Amount
Rate	\$2,100	\$94,500
Total Allocation includes administration rate		\$94,500
Number of Units/Max days of Activation		45

## Attachment A-3 Budget Allocation

Programming Funding Year 2023/2024

<b>Component - Central County - Alternative Pods</b> (See Attachment A-4.2)		
	Each bed/Unit a Day	Total Amount
Rate	\$120	\$1,317,600
Total Allocation includes administration rate		\$1,317,600
Number of Units		30

<b>Component - Central County - Alternative Pods Site Preparation</b> (See Attachment A-4.2)	
Site Preparation	\$283,000
Total Allocation	\$283,000

<b>Component - West County - Alternative Pods</b> (See Attachment A-4.2)		
	Each bed/Unit a Day	Total Amount
Rate	\$120	\$1,317,600
Total Allocation includes administration rate		\$1,317,600
Number of Units		30

<b>Component - West County - Alternative Pods Relocation Offsite Lodging</b> (See Attachment A-4.2)		
	Each bed/Unit a Day	Total Amount
Offsite Lodging for Pod Relocation	\$115	\$354,200
Total Allocation includes administration rate		\$354,200
Number of Units		40

## Attachment A-3 Budget Allocation

Programming Funding Year 2023/2024

<b>Component - Housing Liaison Services</b> (See Attachment A-4.3)	
Staffing and other Staff Related Costs (Case Management, Management, Mileage, Office space, phone, computer, etc)	\$400,000
Minimum Number of Program Specific Workers	4
Financial Assistance (Supplies, Move-in, stabilization, retention)	\$204,000
Available Administrative	\$72,480
<b>Total Allocation</b>	<b>\$676,480</b>

<b>Component - Rapid Re-housing &amp; Homelessness Prevention</b> (See Attachment A-4.4)	
Staffing and other Staff Related Costs (Case Management, Management, Mileage, Office space, phone, computer, etc)	\$315,000
Minimum Number of Program Specific Workers	3
Financial Assistance (Supplies, Move-in, stabilization, retention)	\$371,880
Available Administrative	\$82,426
Number Served	60
<b>Total Allocation</b>	<b>\$769,306</b>

<b>Component - Housing Case Management Services</b> (See Attachment A-4.5)	
Staffing and other Staff Related Costs (Case Management, Management, Mileage, Office space, phone, computer, etc)	\$842,500
Minimum Number of Program Specific Workers 20:1	7
Minimum Number of Program Specific Workers 30:1	1
Financial Assistance (Supplies, Move-in, stabilization, retention)	\$531,793
Available Administrative	\$164,915
<b>Total Allocation</b>	<b>\$1,539,208</b>
Number Served	170

## Attachment A-3 Budget Allocation

Programming Funding Year 2023/2024

<b>Component - Quality Assurance</b> (See Attachment A-4.7)	
Staffing and other Staff Related Costs (Case Management, Management, Mileage, Office space, phone, computer, etc)	\$80,000
Available Administrative	\$9,600
<b>Total Allocation</b>	<b>\$89,600</b>

<b>Component - Housing Careers Program</b> (See Attachment A-4.12)	
Staffing and other Staff Related Costs (Case Management, Management, Mileage, Office space, phone, computer, etc)	\$124,250
Available Administrative	\$14,910
<b>Total Allocation</b>	<b>\$139,160</b>
Number Served	45

<b>Total Budget</b>	<b>\$8,768,593</b>
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## 2023-2024 Washington County Supportive Housing Services Street Outreach Program Attachment A-4.1 Scope of Work

### SCOPE OF WORK (SOW)

This Scope of Work outlines the contractual requirements to which the Street Outreach providers must adhere. This document is not a standalone document and works in conjunction with the Work Order, Program Standards and Program Manual. Washington County Department of Housing Services (DHS) maintains the right to make changes related to prioritization, matching and other aspects of the implementation of the complete system. Programs will be notified through policies, interim guidance, and other forms of communication when deemed necessary. Programs must comply with all local, state and federal laws constituted to protect against discrimination and harassment and relative to privacy, confidentiality, and financial management of grant funds.

### STREET OUTREACH OVERVIEW

- Street-based outreach teams of staff are critical to our efforts to address homelessness. The Street Outreach program is committed to transforming the lives of individuals experiencing homelessness through comprehensive street outreach efforts that partner with the participants to connect them to permanent housing as quickly as possible. Using a collaborate approach among providers, coordinated by Washington County DHS, providers will: Identify, engage, and assess individuals in need of services;
- Refer to housing programs and keep engaged individuals connected to services;
- Ensure accuracy and completeness of HMIS records to ensure appropriate prioritization Document contacts and collect needed documentation for referred programs and services.

These outreach goals are reached by meeting people where they are, to build relationships and by establishing creative community partnerships that eliminate barriers to services. Street outreach services establish supportive relationships and enhance the possibility that participants will access the necessary services and supports that will help them move into permanent housing. Street outreach must adhere to Housing First, Harm Reduction, Low Barrier and Trauma-Informed Care approaches.

Street outreach teams will develop relationships by learning the personal narrative of the individual and using assertive engagement, motivational interviewing and other person centered techniques to engage them in efforts to leave the streets for permanent housing. During the engagement phase, the street outreach teams begin to develop a care plan and shall work to complete the Community Connect Phase 1 Assessment. Street outreach teams provide a variety of services including connecting individuals to medical care; provision of supplies such as sleeping bags, tents, food, masks, vaccines, naloxone, clothing including outerwear and food; and creating solid, warm hand-off connections to the appropriate housing services. Beyond emergent needs, the primary objective of street outreach is to get individuals ready for long term supportive housing.

### DEFINITIONS

1. Pre-Engagement Phase: Street outreach teams build rapport and a trusting relationship with individuals. During the pre-engagement phase, street outreach teams assess basic needs and get to know the personal narrative of the individual. During this phase, a person may or may not be willing to accept any assistance. Regardless of the level of engagement, street outreach teams have a variety of tools they can offer to people to increase engagement and build trusting rapport. Pre-engagement may also involve “reactive outreach” in response to hot spots identified as priority by DHS.

2. Engagement Phase: This phase begins when an individual expresses a willingness to obtain housing assistance from a street outreach team and connect to housing or shelter services. During the Engagement phase, the street outreach team enrolls the person in the program (if not previously enrolled), develops a care management/housing plan, and completes or updates a Community Connect Phase 1 Assessment. Rapid Resolution conversations are encouraged throughout this phase.
3. Encampment: an outdoor location with a fixed, visible structure where two or more individuals gather, often under bridges, or in remote areas.
4. Pop Up Locations: temporary encampment sites that appear quickly and are usually temporary.
5. Hot Spot: a location where two or more unhoused persons are gathered without a structure.
6. Rapid Re-Housing: an intervention that connects families, individuals, and youth experiencing homelessness to permanent housing through a tailored package of assistance that may include the use of time-limited financial assistance and targeted supportive services. Rapid Re-Housing programs help families, individuals, and youth living on the streets or in emergency shelters solve the practical and immediate challenges to obtaining permanent housing while reducing the amount of time they experience homelessness, avoiding a near-term turn to homelessness, and linking to community resources that enable them to achieve housing sustainability in the long term. Rapid Re-Housing is an important component of a community's response to homelessness.
7. Rapid Resolution: an intervention designed to assist the participant in identifying their own resources and natural networks that could end their unhoused situation for either a temporary or long-term period. All persons engaged by Street Outreach teams will be engaged in a Rapid Resolution conversation early in the relationship-building phase (and occasionally throughout engagement). The goal is to assist the person to quickly identify and secure a safe place to live, as well as the social and economic supports needed to help them avoid future experiences of homelessness. All Street Outreach teams must receive training in Rapid Resolution.
8. Warm Hand-Off: a participant-centered approach to making referrals to services and support agencies. Due to the usual trauma that most housing crisis participants are experiencing, making a referral by simply explaining what it is and giving them a phone to call creates a high likelihood of an incomplete connection.

## ELIGIBILITY FOR SERVICES

1. Pre-engagement: Establishing eligibility is not necessary for pre-engagement or general street outreach services. While any person who is living on the streets, in a car, or a place not meant for human habitation is eligible for outreach services, they may not all be eligible for a housing program.
2. Engagement: During the Engagement phase, the street outreach team enrolls the person in the outreach program (if not previously enrolled), develops a case management which may include a housing plan and completes a Community Connect Phase 1 Assessment, if not already completed. All Street Outreach programs are responsible for conducting a Phase 1 Assessment which will establish eligibility. The assessments must be administered by staff who are trained in the assessment and be conducted in a place that allows the participant the needed privacy for answering questions. During the engagement phase, individuals/households will need to meet criteria for some services and housing programs.
  - a. Households must be determined as homeless according to HUD's Final Rule Defining Homelessness (Categories 1 & 4) (24CFR parts 91, 576 and 578). Households must also meet the following eligibility criteria.
    - i. Youth may include those "couch surfing" or involuntarily doubled up.
    - ii. Persons exiting an institution that will be unhoused once released or discharged.



3. In keeping with being a Housing First, Low Barrier, Harm Reduction and Trauma-Informed program, Street Outreach programs shall not establish policies, procedures, or assessments that screen out participants or deny them assistance based on any of the following criteria:
  - Lack of income or employment
  - Lack of identification documentation
  - Presence of mental health, disabilities, or other psychosocial challenges
  - Lack of sobriety
  - Lack of a commitment to participate in a treatment program
  - Criminal background
  - Lack of vaccines
  - Presence of, or number of evictions
  - Desire to be served by a different street outreach team or agency
  - Any other “criteria” thought to predict challenges/barriers/success to long-term housing success generally considered “hard to work with”

## SUPPORTIVE SERVICES AND ACTIVITIES

1. Provider must serve all street-based persons who are experiencing homelessness including adults, families, veterans, and Transition Age Youth (TAY), making the appropriate warm hand-offs and referrals to the respective system/housing resources at the appropriate time.
  - 1.1. In the context of street outreach, a warm hand-off refers to a direct and confirmed linkage that may include participant transport to a provider, an introduction, and joint coordination of services.
  - 1.2. Street outreach services must be scheduled with an extremely flexible schedule to include early mornings (6-8am), evenings (7-9 PM), late night (10pm- 1am), and weekends.
2. The primary goal of Street Outreach programs is to engage the participant with the clear focus on assisting them in moving from the streets/encampments to permanent housing as quickly as possible. Provider must aim to link participants engaged in Outreach services to shelter, permanent housing programs, and other long-term case management services (and/or other programs).
3. Providers must locate, identify, and build relationships with unsheltered, unhoused individuals and households and work to engage them for the purpose of providing immediate support and referrals to housing programs within the Community Connect System. Since services and resources are voluntary, the degree of engagement between the participant and the Street Outreach team will determine the services, timing, and sequence of referrals. However, the voluntary nature of services does not preclude the Street Outreach team to continue to reach out and try to create a solid engagement where services are accepted. Programs must assist participants with the range of funded and leveraged activities based on the needs and desires of the participant.
4. Street Outreach teams shall maintain regular and ongoing participant contact and tailor the intensity and frequency of services provided to participant’s level of functioning and acuity of needs, utilizing progressive engagement. The frequency of visits will vary. During initial engagement, three or more face-to-face visits per week may be necessary to build a trusting rapport.
  - 4.1. Participant’s refusal to engage in street outreach services cannot be a reason for exiting the participant from the program if they have been enrolled, or to stop attempting to work with them. Building rapport with
5. While street outreach services are always voluntary, it is the responsibility of the Street Outreach teams to ensure successful engagement with the participants. If contact stops between the Street Outreach team and the participant, the Street Outreach team must use any means necessary to attempt to reconnect with the participant. All attempts must be documented in the Homeless Management Information System (HMIS).
  - 4.1. Participant’s refusal to engage in street outreach services cannot be a reason for exiting the participant from the program if they have been enrolled, or to stop attempting to work with them. Building rapport with

people who are as disconnected from the system as those who are living on the streets or encampments (etc.) can take a great deal of persistence and time.

6. Street outreach support will be provided in accordance with procedures approved by Washington County DHS, aligned with the Program Standards, and consistent with laws, regulations, and current best practices and standards.
7. Given that there are various kinds of outreach, including “reactive outreach”, the caseload may fluctuate. Supervisors should be actively managing caseloads to protect Street Outreach workers from burn-out, compassion fatigue, and vicarious trauma.
  - 7.1. Street Outreach providers are responsible for monitoring the caseloads of their Outreach workers. It is extremely difficult to maintain a certain level of caseload especially when there is reactive work to be done.
  - 7.2. Active street outreach must be conducted for 25 or more hours per week for each outreach team in designated areas. Street outreach hours are calculated as a team consisting of two or more outreach workers.

## OUTREACH, ENGAGEMENT, AND ENROLLMENT

1. All Street Outreach providers must work with other funded Street Outreach programs and Washington County DHS staff to ensure coordination and collaboration. Creating the coordination of outreach programs will be the responsibility of the Washington County DHS. Providers’ role within this will include:
  - 1.1. Assistance with creating an “outreach map” of designated locations for each team to cover. This will include encampments, pop up locations, and hot spots
  - 1.2. Creating a schedule for the Street Outreach teams that ensures street outreach is being conducted at various times during the day and teams are not overlapping coverage. The remaining hours will be used for following-up with participants, assisting in making appointments, providing warm hand-off, transporting participants, documentation search and collection, collaboration, and training
  - 1.3. Collaboration on finding participants and connecting disconnected participants to their case manager or point person in street outreach of housing programs for reengagement
  - 1.4. Responding to urgent requests for outreach services to hot spots or encampments
    - 1.4.1. The collaborative work must also create an assignment schedule to ensure that each provider knows when it is their responsibility to respond to requests through the Homeless Camp Reporting Portal
2. All Street Outreach Programs must respond within twenty-four (24) hours to encampments and hot spots that are identified as high priority by Washington County DHS staff and reported through the Washington County Homeless Camp Reporting Portal.
3. **Inclement weather and other emergency response:** Outreach staff are required to participate in County-wide response efforts during an emergency or inclement weather event. This may include 24/7 outreach services to unsheltered people at risk, supporting shelter program staff, attending daily meetings, and adjusting services to prioritize emergency response needs. This may also include staffing shelter and transportation services during the 24-hour response, throughout the weather event.

## SHELTER

1. Street Outreach team will assist participants in accessing appropriate shelter as desired through referrals until permanent housing placement is secured. Shelter may include, but not be limited to, non-congregate shelter, congregate shelter, transitional housing, privately funded shelters, and other temporary housing opportunities.
  - 1.1. It is of critical importance that Street Outreach teams work diligently to understand any resistance experienced by participants to entering shelter. Assessing what is getting in the way of utilizing shelter will assist the staff in finding the right kind of shelter that would likely work for each participant.

## HMIS AND PARTICIPANT RECORDS

1. In order to provide well-coordinated support for participants and manage the limited resources available in Washington County, all Street Outreach providers must utilize HMIS to track participants served, services provided, referrals made, and referrals attained. HMIS documentation should be entered no later than forty-eight (48) hours after engagement or activity.
2. Providers shall generate and maintain retrievable program records, including records relating to each participant that receives services. Documents can be digitally uploaded into HMIS to relieve the burden of hard files. If hard files are utilized, the provider shall ensure appropriate safeguards are always implemented to secure participants' Protected Health Information in compliance with HIPAA regulations.
3. **During the pre-engagement phase of Outreach work, none of the following records are required** due to the nature of this phase. If a person offers to show their documents, they can be entered into HMIS if the participant has been enrolled in outreach services.
  - a. When a participant is open to signing an ROI, and ROI can be signed at any phase.
4. **Once the engagement phase has begun, the following records are required**, but not limited to:
  - 1.2. HMIS Release of Information (ROI)
  - 1.3. Grievance Policy and Procedures Acknowledgment by participant
  - 1.4. Community Connect Phase 1 Assessment
  - 1.5. Eligibility documents (if applicable):
    - 1.5.1. Identification
    - 1.5.2. Income verification
    - 1.5.3. Homelessness verification or the self-certification form
  - 1.6. Referrals or information pertaining to primary medical care, mental health services, and/or substance use disorder services if applicable.
  - 1.7. Case Closure Documentation: Transition Plan
  - 1.8. Any other participant documentation as required at Washington County's discretion
5. In addition to provider requirements for utilization of HMIS, provider is also required to adopt and implement best practices for data entry as follows:
  - 2.1. With any participant or household, the provider will first search the HMIS database for an existing profile; if none is found, the provider will collect and record the participant/household's consented information into the HMIS and create a client record
  - 2.2. Provider must complete the participant's HMIS profile to the extent that the participant provides the needed information. With their consent, this may include the participant's personal protected information.
  - 2.3. Provider must complete the HMIS program enrollment to the extent that the participant provides the needed information. When previously undisclosed information is gathered, the provider must update the program enrollment with the applicable information
  - 2.4. With any participant or household, the provider will check for any existing Phase 1 Assessment in HMIS; if none is found, the provider will seek the consent for and the completion of the Phase 1 Assessment. If completed, provider must enter the participant's Phase 1 Assessment in HMIS as soon as possible, but not to exceed forty-eight (48) hours
  - 2.5. With any participant or household, the provider must enter all service(s) provided or referrals made and attained to outside agencies
  - 2.6. Update information and complete case notes on services provided to the participant as soon as possible, but no later than forty-eight (48) hours following the provision of services

- 2.7. If a participant obtains permanent housing, the provider must ensure the move-in date and permanent housing location is recorded in HMIS as soon as possible but no later than forty-eight (48) of any change

## PROVIDER OBLIGATIONS

1. Provider must ensure that Street Outreach teams are street-based and are providing outreach services in a proactive way (e.g., providing routine outreach services in a pre-determined area during their regularly scheduled hours in accordance with a County-wide outreach strategy or plan).
2. Provider must ensure that street-based services are conducted in Street Outreach teams of two or more individuals. Street outreach providers can support other providers in their designated areas to ensure that outreach is being conducted with two or more individuals. Street outreach should not be conducted alone.
3. Provider must ensure that each Street Outreach team engages in a minimum of 20 hours a week of street-based outreach in assigned designated areas.
4. Provider must ensure that outreach teams are provided the appropriate safety and field-based services training, as well as ensure that staff are equipped with appropriate clothing and equipment.
5. Provider must establish policies and procedures for how to communicate safety needs to the agency leadership by the outreach teams.

## PERFORMANCE TARGETS

Street Outreach Key Performance Targets		
No.	Key Performance Targets	Target Goal
1.	% of enrolled households with active and complete Phase I Community Connect Assessment. Complete Phase I assessments include accurate eligibility information and complete referrals to short, medium, and long-term housing programs when appropriate for participants.	95%
2.	% Street Outreach participants enrolled with at least four case management notes per month entered to HMIS each month in the engagement phase	90%
3.	% Street Outreach participants with positive or neutral program exits. Positive exit destinations include: Permanent housing/housing enrollment, self-resolution of housing need, transitional housing placement, existing housing placement sustained etc. Neutral exit destinations include: Institutional settings, doubled-up, deceased, temporary housing placement, shelter etc.	50%

## APPENDIX I

### ELIGIBLE OUTREACH SERVICES

Supportive Services	Guidance
<b>Pre-Engagement</b>	<ul style="list-style-type: none"> <li>• Locate, identify, and build relationships with unsheltered persons and engage them for the purpose of providing immediate support, intervention, and connections with homeless assistance programs and/or mainstream social services and housing programs.</li> <li>• These activities consist of making an initial assessment of needs and eligibility; providing crisis counseling; addressing urgent physical needs, such as medical care, providing meals, blankets, clothes, or toiletries; and information and referrals to programs targeted to people experiencing homelessness.</li> </ul>
<b>Engagement</b>	<ul style="list-style-type: none"> <li>• These activities consist of providing information and referrals to programs targeted to homeless people; providing warm hand-off referrals mainstream social services and housing programs, including emergency shelter, transitional housing, community-based services, permanent supportive housing, and rapid re-housing programs.</li> <li>• Provide transportation to appointments for medical care or attaining documents or eligibility in mainstream resources.</li> </ul>

## APPENDIX II

### ELIGIBILITY INFORMATION

CATEGORY	GUIDANCE
<b>Populations Served</b>	<p>HUD Category 1 &amp; 4 (homeless on the streets, encampments, in vehicles or other places not meant for human habitation) or exiting an institution they have resided in for 90-120 days and were un-housed before they entered.</p> <p>For youth, “couch surfing”, or involuntarily doubled up</p>
<b>Phase I Assessment</b>	<ul style="list-style-type: none"> <li>• Conduct in HMIS</li> </ul>

## APPENDIX III

### ADDITIONAL RECORD-KEEPING AND ELIGIBILITY INFORMATION

CATEGORY	GUIDANCE
<b>Populations Served</b>	<p><u>Adults</u>: individuals or household where all members are 18+</p> <p><u>Youth</u>: Ages 18-24</p> <ol style="list-style-type: none"> <li>1) <u>Families</u>: Households consisting of one or more minor children (17 and under) with one or two adults who are living together</li> <li>2) Households currently without minor children where one member of the household is pregnant</li> <li>3) Households with qualified dependents over the age of 18 who is (a) incapable of self-sustaining employment by reason of mental or physical disability, and (b) depended upon the Head of Household for support and care</li> </ol> <p><b>Households consist of any self-identified people living together.</b></p> <p><b><u>Qualified Dependent</u></b>: An individual over the age of 18 who is (a) incapable of self-sustaining employment by reason of mental or physical disability, and (b) is dependent upon a parent or guardian for support.</p>
<b>Participant Identification</b>	<ul style="list-style-type: none"> <li>• If a participant does not have identification at the time of program screening, <b><i>program must not deny enrollment into the program and rather, assist the participant in obtaining whatever ID is needed after enrollment.</i></b></li> <li>• Participant must (eventually) have a form of identification on file.</li> <li>• Acceptable forms of ID <ul style="list-style-type: none"> <li><u>Category A</u>: acceptable forms of government ID <ul style="list-style-type: none"> <li>▪ State-issued DMV ID</li> <li>▪ State-issued DMV driver's license</li> <li>▪ Passport/Passport Card</li> <li>▪ US Military ID</li> <li>▪ Immigration Services ID (USCIS)</li> <li>▪ Visa issued by the US Depart. Of State</li> <li>▪ Government issued ID</li> </ul> </li> <li><u>Category B</u>: alternative photo ID <ul style="list-style-type: none"> <li>▪ Student ID</li> <li>▪ Shelter ID</li> <li>▪ Employment ID</li> <li>▪ Bank/Debit/Credit Card</li> <li>▪ Transportation Card (Metro)</li> <li>▪ Library Card</li> <li>▪ Gym Membership Card</li> <li>▪ Warehouse Club Membership Card</li> </ul> </li> <li><u>Category C</u>: alternative non-photo ID <ul style="list-style-type: none"> <li>▪ Birth Certificate</li> <li>▪ Utility Bill</li> <li>▪ Lease/Rental Contract</li> </ul> </li> </ul> </li> </ul>

	<ul style="list-style-type: none"> <li>▪ School Records</li> <li>▪ Medical/Dental insurance card</li> <li>▪ Debit/bank card</li> <li>▪ Credit Card</li> <li>▪ Legal records/court document</li> <li>▪ Tax Identification Number (TIN)/paperwork</li> <li>▪ Social Security Card</li> <li>▪ American Automobile Association Card (AAA)</li> <li>▪ American Association of Retired Persons Card (AARP)</li> </ul> <p><b>IMPORTANT:</b> <i>If the person does not have anything in <b>Category A</b>, they may provide one from <b>Category B AND</b> one from <b>Category C</b></i></p> <p><b>A copy of a Social Security Card is not a requirement.</b></p>
<b>Income</b>	<p>Participant must be at or below 50% AMI and must be re-evaluated annually as to whether their income is within this level. Documentation must be placed in HMIS</p> <p>May also use Wash Co Self Certification of Income and Homelessness Status</p>
<b>Veterans</b>	<p>Must not be eligible for Supportive Services for Veterans Families (SSVF)</p> <ul style="list-style-type: none"> <li>• Verification from an SSVF provider that the veteran has utilized all available SSVF resources or does not qualify for SSVF is required to serve participants.</li> </ul>



## 2023-2024 Washington County Supportive Housing Services Alternative Shelter Program – Central County Attachment A-4.2 Scope of Work

### SCOPE OF WORK (SOW)

This Scope of Work is the contractual requirements to which Alternative Shelter providers must adhere. This document is not a standalone document and works in conjunction with the Work Order and Program Standards. Washington County Department of Housing Services (DHS) maintains the right to make changes related to prioritization, matching, and other aspects of the implementation of the complete system. Programs will be notified through policies, interim guidance, and other forms of communication when deemed necessary. Programs must comply with all local, state, and federal laws constituted to protect against discrimination and harassment and relative to privacy, confidentiality, and financial management of grant funds.

### PROGRAM COMPONENT OVERVIEW

Washington County Alternative Shelter programs provide a low barrier, safe and supportive, short term, 24-hour emergency shelter that provides essential services for persons who are experiencing homelessness or housing instability. While at Alternative Shelter, participants are assisted by shelter staff and case managers to connect to resources to increase their housing stability.

The prioritization of shelter beds takes into consideration various factors that include mental health conditions, self-reported physical disability, and equitable utilization based on race and ethnicity.

This contract also includes the provision of forty off-site motel units for 40 households during the relocation of the Safe Rest Pods. Provider shall adhere to all contract obligations while participants are utilizing the off-site motel rooms.

All service providers shall follow Washington County Program Standards, which can be found in the provider's contracting documents.

### SITE PREPARATION

The Site is located at 2270 SW 198<sup>th</sup> Ave in Aloha, Oregon. The Provider is responsible for installing pod shelters on the Site for temporary shelter use and maintaining both the pods and the Site throughout the term of the Contract. To prepare the Site for short-term pod shelter use, the Provider will hire a licensed contractor who will provide labor, equipment, and materials in support of the following preparations:

The Provider shall:

1. Prepare the Site for short-term pod shelter use by installing temporary water, sewer, and power supplies to meet the specifications set forth in RFP 2023.033 ITB, incorporated by reference herein. At a minimum, this work will include the following:
  - a. Install and provide PGE infrastructure.
  - b. Install and provide 2" primary conduit to PGE provided pad mount transformer, 3" secondary conduit to new service.
  - c. Install and provide new 400A 120/240V service.
  - d. Install and provide 1 dedicated circuit per pod for new portable heat pumps.
  - e. Install and provide circuits for existing receptacles and lighting in the pods.
  - f. Install and provide 50A 120/240V circuit for hygiene trailer.
  - g. Install and Provide two GFCI pedestals for the tent.
  - h. Install and provide circuits for two sheds for office space.
  - i. Install and provide one circuit for storage shed light and single GFCI.



- j. Install and provide new sewer connection to hygiene trailer and existing utility.
  - k. Install and provide new water connection to hygiene trailer tapped into existing water.
  - l. Prepare and obtain required grading, excavation, traffic control, erosion control drawings and permits.
  - m. Repair damaged landscaping in a manner that restores kind and quality.
2. Provider shall prepare the ground for the pods to be level, through grading, a temporary leveling foundation, or other method. The ground must be prepared in a manner that maintains the flat grade and integrity of the ground as support for the pods for the duration of the contract.
  3. Obtain all necessary permits from Washington County.
  4. Provider shall also be responsible for the following:
    - a. Maintain and repair of any systems installed by Provider for use by the temporary shelter, including electrical lines and water sources, to the extent directly related to the Provider's installation work.
    - b. Furnish fencing around the temporary pod village.
    - c. Furnish a tent for use as a covered eating and gathering space.
    - d. Coordinate with and provide support to the County to dismantle the pods and other temporary shelter fixtures and return the site to the at the end of the contract term.

## SERVICE PROVISION

The provider shall provide Alternative Shelter in accordance with procedures approved by Washington County Department of Housing Services (DHS), aligned with the Program Standards, and consistent with laws, regulations, and current best practices and standards.

## REFERRALS

Provider shall follow the Washington County and Community Connect Assessment and Referral Process.

1. Provider will process and accept referrals from Community Connect as outlined in the Program Standards. Internal referrals are not allowed.
  - a. Once a participant is referred, the provider must contact the referral once per day for 72 hours. All attempts at contact must be documented in a Service Transaction in the Homeless Management Information System (HMIS).
  - b. Providers must keep their Outstanding Referrals list current in HMIS. No referral should be older than 72 hours without a documented Service Transaction in HMIS. The 72 hours can be business hours if there are no staff on the weekends available to call referrals.
  - c. Provider will work with Shelter Program Coordinator on any referrals that are prioritized by the Shelter Program Coordinator.

## INTAKE

1. Provider must create Program Participation Guidelines and Agreements to be reviewed by Washington County Housing. This document must be shared and reviewed with participants upon program enrollment. The document should include policies and procedures to address:
  - a. Safety and security concerns
  - b. Search and seizure of property
  - c. Grievances

- d. Unit cleanliness
- e. Program engagement:  
Provider must create an Engagement Policy that monitors a participant's involvement in the program, including:
  - i. A set frequency of expected contact between the participant and the program case manager or staff
  - ii. A way to monitor and document the participant's progress on gaining stability (establishing income, obtaining essential documents, applying to housing, etc.)
  - iii. Written expectations of what will happen if engagement and progress goals are not being met
- f. All appropriate Releases of Information (ROIs) to allow for effective communication with system partners and other service providers
- g. Exits from the shelter, including:
  - i. Extended absences
  - ii. Unplanned exits
  - iii. Exits after housing is attained
  - iv. Returning an exited participant to shelter

The Program Participation Guidelines and Agreements must be participant-centered to minimize barriers to accessing an Alternative Shelter bed and prevent/minimize exits from program due to rule violations. Guidelines and Agreements must be shared and reviewed with participants upon program enrollment, which shall include a participant consent section that is signed and dated by the participant, a witness, and the provider.

2. No provider shall establish policies and assessments that screen out or exit households based on any of the following criteria:
  - a. Lack of sobriety
  - b. Lack of income
  - c. The presence of mental health issues, disabilities, or other psychosocial challenges
  - d. Challenges in gathering eligibility documentation
  - e. Lack of commitment to participate in treatment
  - f. Criminal background
  - g. Presence or number of evictions
  - h. Lack of Service Animal/Emotional Support Animal (ESA) documentation
  - i. Past program participation or previous stay at provider facilities
  - j. Any assessment that indicates the participant is difficult to work with
  - k. The enrollment and participation agreements are not expected to disregard the safety of staff and/or other participants. Policies must exist for how to respond to a real threat of danger and how such a participant will be handled
3. Provider shall make adequate accommodations for new participant enrollment, including facilitating program intakes after business hours or on weekends, when needed.

## ESSENTIAL SERVICES

1. Alternative Shelter provider will provide the following services (this is not an all-inclusive list):
  - a. Twenty-four (24) hour bed/unit availability
  - b. Housing-Focused Case Management
    - i. If participants are receiving Housing Navigation services from an external partner, Alternative Shelter provider must continue to provide additional Housing-Focused Case Management services to support and augment Housing Navigation services to coordinate and facilitate

housing placement.

- c. Residential Supervision
  - d. Crisis Intervention and Conflict Resolution
  - e. Three meals per day and snacks
  - f. Restrooms and showers
  - g. Transportation for critical access to medical appointments, accessing housing, etc.
2. Housing-Focused Case Management Services should be paired to assist participants in moving forward in accessing permanent housing through collaboration with housing programs. This includes, but is not limited to:
    - a. Creating a Service Plan with the participant to set housing, financial, and wellness goals
    - b. Completing Phase 1 Assessments and referring to Housing Intervention Programs in HMIS
    - c. Support with completing housing applications
    - d. Accompanying the participant to housing and/or leasing appointments
    - e. Other support associated with the housing placement process
  3. Provider must document the content and outcome of case management meetings with participants in HMIS, with at least 2 Service Transactions recorded each month.

## LENGTH OF ENROLLMENT

1. Provider must strive to assist participants in moving out of shelter and into their own Permanent Housing unit as quickly as possible. The total length of stay is 100 days of enrollment unless a reason for longer enrollment is accurately documented in HMIS. Provider needs to account for shelter enrollments longer than 100 days.
2. Provider must not permanently “ban” participants from re-entering the Non-Congregate Shelter Program, regardless of the reason for the participant’s exit or termination from previous enrollments in the provider’s programs. Upon exit, provider must notify the participant of the date they are eligible for re-referral to the shelter. Provider shall use trauma informed care principles when considering the least restrictive time for a participant to be exited from the program. This shall be recorded in a Critical Incident Report and submitted to the Shelter Program Coordinator, as well as a Service Transaction in HMIS.

## RECORDS, FORMS, AND RECORD KEEPING

1. The provider shall generate and maintain retrievable program records, including records relating to each Alternative Shelter participant that receives services. Records may be hard files that can be digitally uploaded into HMIS or may be kept in HMIS. If hard files are utilized, the provider shall ensure appropriate safeguards are implemented to secure participants’ Protected Health Information (PHI) in compliance with HIPAA regulations.

These records shall include, but not be limited to:

- a. Identifying documents
  - b. Signed program policies and intake documents
  - c. Case planning documents
  - d. Incident Reports
  - e. Services provided
2. Critical Incidents must be reported directly to the Washington County Shelter Program Coordinator. Critical Incidents are incidents that:
    - a. Required a call to 911 or Emergency Medical Services
    - b. Involve Law Enforcement
    - c. Involve severe injury or death of a participant

## FACILITIES AND OPERATIONS

1. Providers are permitted to prohibit the possession and/or use of weapons, alcohol, and/or illegal drugs on the site.
  - a. Provider must, however, establish Harm Reduction policies, practices, and procedures designed to minimize negative consequences resulting from participants' use or possession of contraband items as referenced above
  - b. Harm Reduction is not intended to prevent the termination of a participant whose actions or behavior constitute a threat to the safety of participants and/or staff
2. Provider must ensure 24-hour security on alternative shelter property.
3. Provider must engage and maintain "Good Neighbor" relationships and interactions.
  - a. "Good Neighbor" policy shall be reviewed by Washington County Housing.
4. Participants must have equitable access to laundry services.
5. Personal shelters (pods/microhuts) shall be cleaned at least one time per week.
6. Community areas and entrance ways must be clean and maintained, allowing for accessibility. Shelter property shall be free of litter and excess garbage. Areas surrounding the shelter location shall also be monitored for excess trash or litter that could be associated with shelter residents.
7. All vandalism must be cleaned, and site must maintain a clean external and internal appearance.
8. Provider must have or provide access to a phone which participants can use within reasonable limits.
9. Provider must have the ability to store participants' belongings and have policies and procedures for the return of funds and/or possessions held on behalf of a participant within twenty-four (24) hours of the participant's request.
10. In the event of a medical need, provider must refer participants to a medical facility or clinic for health examinations, emergency treatment, and follow-up visits.
11. Provider must promptly and appropriately respond to medical problems of participants and staff.
  - a. Provider must ensure regular training is provided to staff and volunteers about common physical and mental health problems of people experiencing homelessness and how to obtain needed and appropriate services
12. Provider must adopt and comply with the County's infectious disease protocols and procedures. Provider must have written action plans for responding to active COVID cases within the shelter.
13. Provider must allow for access in and out of the shelter between 6 a.m. and 8 p.m. and accommodate alternate access for anyone who may have employment and/or other important scheduling needs outside of those designated hours.
14. Health and Fire Inspections: Provider understands and agrees that City/County may have the appropriate Department of Public Health or Fire inspect the contracted service sites, including shelters and supportive service sites, as often as once (1) every three months or upon receipt of a complaint to determine if the facility is sanitary, healthful, and otherwise safe for its intended or actual use.
  - a. Provider must be provided with a written report as to the conditions at/of the facility and must either correct all deficiencies within thirty (30) calendar days of receipt of the report or request an extension of time from the appropriate Public Health or Fire Department to make such corrections. Provider must forward a copy of the Health or Fire Department's response to DHS. Failure to permit inspection or rectify the defect(s) in a timely manner will be considered a material breach of this contract and will result in DHS taking remedial actions up to and including termination of this Agreement

## PERFORMANCE TARGETS

Shelter	Target Goal	Rationale
Shelter bed occupancy rate	90%	Supports system utilization
% of positive exits from shelter within 100 days	75%	Supports Work Plan goal: Reduce average stay in shelter programs to less than 100 days, increase exits to housing to 75%
Providers shall update the service participant's record in HMIS within three business days of any changes. This includes updates to: (a) participant's standardized assessment (b) participant's housing status (c) services provided to the participant (including attempted contact for referrals and enrollment into shelter) (d) financial assistance provided to the participant	No more than 3 business days	Supports Data Timeliness
Providers must regularly monitor data integrity and make data quality corrections as needed. Providers are responsible for maintaining a data quality score of 95% across all required reports outlined in the Data Quality Plan.  Regular reports will be provided to monitor Program Specific data integrity.	95%	Supports Data Quality



## 2023-2024 Washington County Supportive Housing Services Alternative Shelter Program – West County Attachment A-4.2 Scope of Work

### SCOPE OF WORK (SOW)

This Scope of Work is the contractual requirements to which Alternative Shelter providers must adhere. This document is not a standalone document and works in conjunction with the Work Order and Program Standards. Washington County Department of Housing Services (DHS) maintains the right to make changes related to prioritization, matching, and other aspects of the implementation of the complete system. Programs will be notified through policies, interim guidance, and other forms of communication when deemed necessary. Programs must comply with all local, state, and federal laws constituted to protect against discrimination and harassment and relative to privacy, confidentiality, and financial management of grant funds.

### PROGRAM COMPONENT OVERVIEW

Washington County Alternative Shelter programs provide a low barrier, safe and supportive, short term, 24-hour emergency shelter that provides essential services for persons who are experiencing homelessness or housing instability. While at Alternative Shelter, participants are assisted by shelter staff and case managers to connect to resources to increase their housing stability.

The prioritization of shelter beds takes into consideration various factors that include mental health conditions, self-reported physical disability, and equitable utilization based on race and ethnicity.

This contract also includes the provision of forty off-site motel units for 40 households during the relocation of the Safe Rest Pods. Provider shall adhere to all contract obligations while participants are utilizing the off-site motel rooms.

All service providers shall follow Washington County Program Standards, which can be found in the provider's contracting documents.

### SERVICE PROVISION

The provider shall provide Alternative Shelter in accordance with procedures approved by Washington County Department of Housing Services (DHS), aligned with the Program Standards, and consistent with laws, regulations, and current best practices and standards.

### REFERRALS

Provider shall follow the Washington County and Community Connect Assessment and Referral Process.

1. Provider will process and accept referrals from Community Connect as outlined in the Program Standards. Internal referrals are not allowed.
  - a. Once a participant is referred, the provider must contact the referral once per day for 72 hours. All attempts at contact must be documented in a Service Transaction in the Homeless Management Information System (HMIS).
  - b. Providers must keep their Outstanding Referrals list current in HMIS. No referral should be older than 72 hours without a documented Service Transaction in HMIS. The 72 hours can be business hours if there are no staff on the weekends available to call referrals.
  - c. Provider will work with Shelter Program Coordinator on any referrals that are prioritized by the Shelter Program Coordinator.

## INTAKE

1. Provider must create Program Participation Guidelines and Agreements to be reviewed by Washington County Housing. This document must be shared and reviewed with participants upon program enrollment. The document should include policies and procedures to address:
  - a. Safety and security concerns
  - b. Search and seizure of property
  - c. Grievances
  - d. Unit cleanliness
  - e. Program engagement:
 

Provider must create an Engagement Policy that monitors a participant's involvement in the program, including:

    - i. A set frequency of expected contact between the participant and the program case manager or staff
    - ii. A way to monitor and document the participant's progress on gaining stability (establishing income, obtaining essential documents, applying to housing, etc.)
    - iii. Written expectations of what will happen if engagement and progress goals are not being met
  - f. All appropriate Releases of Information (ROIs) to allow for effective communication with system partners and other service providers
  - g. Exits from the shelter, including:
    - i. Extended absences
    - ii. Unplanned exits
    - iii. Exits after housing is attained
    - iv. Returning an exited participant to shelter

The Program Participation Guidelines and Agreements must be participant-centered to minimize barriers to accessing an Alternative Shelter bed and prevent/minimize exits from program due to rule violations. Guidelines and Agreements must be shared and reviewed with participants upon program enrollment, which shall include a participant consent section that is signed and dated by the participant, a witness, and the provider.

2. No provider shall establish policies and assessments that screen out or exit households based on any of the following criteria:
  - a. Lack of sobriety
  - b. Lack of income
  - c. The presence of mental health issues, disabilities, or other psychosocial challenges
  - d. Challenges in gathering eligibility documentation
  - e. Lack of commitment to participate in treatment
  - f. Criminal background
  - g. Presence or number of evictions
  - h. Lack of Service Animal/Emotional Support Animal (ESA) documentation
  - i. Past program participation or previous stay at provider facilities
  - j. Any assessment that indicates the participant is difficult to work with
  - k. The enrollment and participation agreements are not expected to disregard the safety of staff and/or other participants. Policies must exist for how to respond to a real threat of danger and how such a participant will be handled
3. Provider shall make adequate accommodations for new participant enrollment, including facilitating program intakes after business hours or on weekends, when needed.

## ESSENTIAL SERVICES

1. Alternative Shelter provider will provide the following services (this is not an all-inclusive list):
  - a. Twenty-four (24) hour bed/unit availability
  - b. Housing-Focused Case Management
    - i. If participants are receiving Housing Navigation services from an external partner, Alternative Shelter provider must continue to provide additional Housing-Focused Case Management services to support and augment Housing Navigation services to coordinate and facilitate housing placement.
  - c. Residential Supervision
  - d. Crisis Intervention and Conflict Resolution
  - e. Three meals per day and snacks
  - f. Restrooms and showers
  - g. Transportation for critical access to medical appointments, accessing housing, etc.
2. Housing-Focused Case Management Services should be paired to assist participants in moving forward in accessing permanent housing through collaboration with housing programs. This includes, but is not limited to:
  - a. Creating a Service Plan with the participant to set housing, financial, and wellness goals
  - b. Completing Phase 1 Assessments and referring to Housing Intervention Programs in HMIS
  - c. Support with completing housing applications
  - d. Accompanying the participant to housing and/or leasing appointments
  - e. Other support associated with the housing placement process
3. Provider must document the content and outcome of case management meetings with participants in HMIS, with at least 2 Service Transactions recorded each month.

## LENGTH OF ENROLLMENT

1. Provider must strive to assist participants in moving out of shelter and into their own Permanent Housing unit as quickly as possible. The total length of stay is 100 days of enrollment unless a reason for longer enrollment is accurately documented in HMIS. Provider needs to account for shelter enrollments longer than 100 days.
2. Provider must not permanently “ban” participants from re-entering the Non-Congregate Shelter Program, regardless of the reason for the participant’s exit or termination from previous enrollments in the provider’s programs. Upon exit, provider must notify the participant of the date they are eligible for re-referral to the shelter. Provider shall use trauma informed care principles when considering the least restrictive time for a participant to be exited from the program. This shall be recorded in a Critical Incident Report and submitted to the Shelter Program Coordinator, as well as a Service Transaction in HMIS.

## RECORDS, FORMS, AND RECORD KEEPING

1. The provider shall generate and maintain retrievable program records, including records relating to each Alternative Shelter participant that receives services. Records may be hard files that can be digitally uploaded into HMIS or may be kept in HMIS. If hard files are utilized, the provider shall ensure appropriate safeguards are implemented to secure participants’ Protected Health Information (PHI) in compliance with HIPAA regulations.

These records shall include, but not be limited to:

- a. Identifying documents
- b. Signed program policies and intake documents



- c. Case planning documents
  - d. Incident Reports
  - e. Services provided
2. Critical Incidents must be reported directly to the Washington County Shelter Program Coordinator. Critical Incidents are incidents that:
    - a. Required a call to 911 or Emergency Medical Services
    - b. Involve Law Enforcement
    - c. Involve severe injury or death of a participant

## FACILITIES AND OPERATIONS

1. Providers are permitted to prohibit the possession and/or use of weapons, alcohol, and/or illegal drugs on the site.
  - a. Provider must, however, establish Harm Reduction policies, practices, and procedures designed to minimize negative consequences resulting from participants' use or possession of contraband items as referenced above
  - b. Harm Reduction is not intended to prevent the termination of a participant whose actions or behavior constitute a threat to the safety of participants and/or staff
2. Provider must ensure 24-hour security on alternative shelter property.
3. Provider must engage and maintain "Good Neighbor" relationships and interactions.
  - a. "Good Neighbor" policy shall be reviewed by Washington County Housing.
4. Participants must have equitable access to laundry services.
5. Personal shelters (pods/microhuts) shall be cleaned at least one time per week.
6. Community areas and entrance ways must be clean and maintained, allowing for accessibility. Shelter property shall be free of litter and excess garbage. Areas surrounding the shelter location shall also be monitored for excess trash or litter that could be associated with shelter residents.
7. All vandalism must be cleaned, and site must maintain a clean external and internal appearance.
8. Provider must have or provide access to a phone which participants can use within reasonable limits.
9. Provider must have the ability to store participants' belongings and have policies and procedures for the return of funds and/or possessions held on behalf of a participant within twenty-four (24) hours of the participant's request.
10. In the event of a medical need, provider must refer participants to a medical facility or clinic for health examinations, emergency treatment, and follow-up visits.
11. Provider must promptly and appropriately respond to medical problems of participants and staff.
  - a. Provider must ensure regular training is provided to staff and volunteers about common physical and mental health problems of people experiencing homelessness and how to obtain needed and appropriate services
12. Provider must adopt and comply with the County's infectious disease protocols and procedures. Provider must have written action plans for responding to active COVID cases within the shelter.
13. Provider must allow for access in and out of the shelter between 6 a.m. and 8 p.m. and accommodate alternate access for anyone who may have employment and/or other important scheduling needs outside of those designated hours.
14. Health and Fire Inspections: Provider understands and agrees that City/County may have the appropriate Department of Public Health or Fire inspect the contracted service sites, including shelters and supportive service sites, as often as once (1) every three months or upon receipt of a complaint to determine if the facility is sanitary, healthful, and otherwise safe for its intended or actual use.
  - a. Provider must be provided with a written report as to the conditions at/of the facility and must either correct all deficiencies within thirty (30) calendar days of receipt of the report or request an extension of

time from the appropriate Public Health or Fire Department to make such corrections. Provider must forward a copy of the Health or Fire Department’s response to DHS. Failure to permit inspection or rectify the defect(s) in a timely manner will be considered a material breach of this contract and will result in DHS taking remedial actions up to and including termination of this Agreement

**PERFORMANCE TARGETS**

Shelter	Target Goal	Rationale
Shelter bed occupancy rate	90%	Supports system utilization
% of positive exits from shelter within 100 days	75%	Supports Work Plan goal: Reduce average stay in shelter programs to less than 100 days, increase exits to housing to 75%
Providers shall update the service participant’s record in HMIS within three business days of any changes. This includes updates to: (a) participant’s standardized assessment (b) participant’s housing status (c) services provided to the participant (including attempted contact for referrals and enrollment into shelter) (d) financial assistance provided to the participant	No more than 3 business days	Supports Data Timeliness
Providers must regularly monitor data integrity and make data quality corrections as needed. Providers are responsible for maintaining a data quality score of 95% across all required reports outlined in the Data Quality Plan.  Regular reports will be provided to monitor Program Specific data integrity.	95%	Supports Data Quality



## 2023-2024 Washington County Supportive Housing Services Hillsboro Congregate Shelter Program Attachment A-4.2 Scope of Work

### SCOPE OF WORK (SOW)

This Scope of Work is the contractual requirements to which Congregate Shelter providers must adhere. This document is not a standalone document and works in conjunction with the Work Order and Program Standards. Washington County Department of Housing Services (DHS) maintains the right to make changes related to prioritization, matching, and other aspects of the implementation of the complete system. Programs will be notified through policies, interim guidance, and other forms of communication when deemed necessary. Programs must comply with all local, state, and federal laws constituted to protect against discrimination and harassment and relative to privacy, confidentiality, and financial management of grant funds.

### PROGRAM COMPONENT OVERVIEW

Washington County Congregate Shelter programs provide a low barrier, safe and supportive, short term, 24-hour emergency shelter that provides essential services for persons who are experiencing homelessness or housing instability. Congregate shelters are for participants who are capable of living in a congregate shelter setting, which includes sleeping and eating in the same room as other participants. While at Congregate shelter, participants are assisted by shelter staff and case managers to connect to resources to increase their housing stability.

The prioritization of shelter beds takes into consideration various factors that include mental health conditions, self-reported physical disability, and equitable utilization based on race and ethnicity.

This contract includes the provision of off-site motel units for 45 households during any public health emergency, should isolation be necessary. Provider will be responsible to provide essential services such as food, clothing, and wellness check-ins at the motel units until the health emergency has ended and households can be returned to congregate shelter.

All service providers shall follow Washington County Program Standards, which can be found in the provider's contracting documents.

### SERVICE PROVISION

The provider shall provide Congregate Shelter in accordance with procedures approved by Washington County Department of Housing Services (DHS), aligned with the Program Standards, and consistent with laws, regulations, and current best practices and standards.

### REFERRALS

Provider shall follow the Washington County and Community Connect Assessment and Referral Process.

1. Provider will process and accept referrals from Community Connect as outlined in the Program Standards. Internal referrals are not allowed.
  - a. Once a participant is referred, the provider must contact the referral once per day for 72 hours. All attempts at contact must be documented in a Service Transaction in the Homeless Management Information System (HMIS).
  - b. Providers must keep their Outstanding Referrals list current in HMIS. No referral should be older than 72 hours without a documented Service Transaction in HMIS. The 72 hours can be business hours if there are no staff on the weekends available to call referrals.
  - c. Provider will work with Shelter Program Coordinator on any referrals that are prioritized by the Shelter

Program Coordinator.

2. Walk-up participants:
  - a. Provider may place walk-up participants in beds that are unoccupied by a Community Connect referral.
  - b. Providers must give notice to walk-up participants that they are accessing a shelter bed just for one night.
  - c. Walk-ups must be recorded in HMIS under "Overflow"
  - d. Shelter Assessments and Referrals must be completed for walk-up participants within 24 hours of their arrival at shelter.
3. Congregate Shelters must always have beds available for drop-offs from First Responders, including Law Enforcement and Emergency Medical Services when the primary need is shelter. Shelter provider must have a written procedure for accepting First Responder drop-offs including, access to longer term services for shelter and housing if appropriate.

## INTAKE

1. Provider must create Program Participation Guidelines and Agreements to be reviewed by Washington County Housing. This document must be shared and reviewed with participants upon program enrollment. The document should include policies and procedures to address:
  - a. Safety and security concerns
  - b. Search and seizure of property
  - c. Grievances
  - d. Program engagement:

Provider must create an Engagement Policy that monitors a participant's involvement in the program, including:

    - i. A set frequency of expected contact between the participant and the program case manager or staff
    - ii. A way to monitor and document the participant's progress on gaining stability (establishing income, obtaining essential documents, applying to housing, etc.)
    - iii. Written expectations of what will happen if engagement and progress goals are not being met
  - e. All appropriate Releases of Information (ROIs) to allow for effective communication with system partners and other service providers
  - f. Exits from the shelter, including:
    - i. Extended absences
    - ii. Unplanned exits
    - iii. Exits after housing is attained
    - iv. Returning an exited participant to shelter

The Program Participation Guidelines and Agreements must be participant-centered to minimize barriers to accessing a Non-Congregate Shelter bed and prevent/minimize exits from program due to rule violations. Guidelines and Agreements must be shared and reviewed with participants upon program enrollment, which shall include a participant consent section that is signed and dated by the participant, a witness, and the provider.

2. No provider shall establish policies and assessments that screen out or exit households based on any of the following criteria:
  - a. Lack of sobriety
  - b. Lack of income
  - c. The presence of mental health issues, disabilities, or other psychosocial challenges
  - d. Challenges in gathering eligibility documentation

- e. Lack of commitment to participate in treatment
- f. Criminal background
- g. Presence or number of evictions
- h. Lack of Service Animal/Emotional Support Animal (ESA) documentation
- i. Past program participation or previous stay at provider facilities
- j. Any assessment that indicates the participant is difficult to work with
- k. The enrollment and participation agreements are not expected to disregard the safety of staff and/or other participants. Policies must exist for how to respond to a real threat of danger and how such a participant will be handled

## ESSENTIAL SERVICES

1. Non-Congregate Shelter provider will provide the following services (this is not an all-inclusive list):
  - a. Twenty-four (24) hour bed/unit availability
  - b. Housing-Focused Case Management
    - i. If participants are receiving Housing Navigation services from an external partner, Non-Congregate Shelter provider must continue to provide additional Housing-Focused Case Management services to support and augment Housing Navigation services to coordinate and facilitate housing placement.
  - c. Residential Supervision
  - d. Crisis Intervention and Conflict Resolution
  - e. Three meals per day and snacks
  - f. Restrooms and showers
  - g. Transportation for critical access to medical appointments, accessing housing, etc.
2. Housing-Focused Case Management Services should be paired to assist participants in moving forward in accessing permanent housing through collaboration with housing programs. This includes, but is not limited to:
  - a. Creating a Service Plan with the participant to set housing, financial, and wellness goals
  - b. Completing Phase 1 Assessments and referring to Housing Intervention Programs in HMIS
  - c. Support with completing housing applications
  - d. Accompanying the participant to housing and/or leasing appointments
  - e. Other support associated with the housing placement process
3. Provider must document the content and outcome of case management meetings with participants in HMIS, with at least 2 Service Transactions recorded each month.

## LENGTH OF ENROLLMENT

1. Provider must strive to assist participants in moving out of shelter and into their own Permanent Housing unit as quickly as possible. The total length of stay is 100 days of enrollment unless a reason for longer enrollment is accurately documented in HMIS. Provider needs to account for shelter enrollments longer than 100 days.
2. Provider must not permanently “ban” participants from re-entering the Non-Congregate Shelter Program, regardless of the reason for the participant’s exit or termination from previous enrollments in the provider’s programs. Upon exit, provider must notify the participant of the date they are eligible for re-referral to the shelter. Provider shall use trauma informed care principles when considering the least restrictive time for a participant to be exited from the program. This shall be recorded in a Critical Incident Report and submitted to the Shelter Program Coordinator, as well as a Service Transaction in HMIS.

## RECORDS, FORMS, AND RECORD KEEPING

1. The provider shall generate and maintain retrievable program records, including records relating to each Non-Congregate Shelter participant that receives services. Records may be hard files that can be digitally uploaded into HMIS or may be kept 100% in HMIS to relieve the burden of hard files. If hard files are utilized, the provider shall ensure appropriate safeguards are always implemented to secure participants' Protected Health Information (PHI) in compliance with HIPAA regulations.

These records shall include, but not be limited to:

- a. Identifying documents
  - b. Signed program policies and intake documents
  - c. Case planning documents
  - d. Incident Reports
  - e. Services provided
2. Critical Incidents must be reported directly to the Washington County Shelter Program Coordinator. Critical Incidents are incidents that:
    - a. Required a call to 911 or Emergency Medical Services
    - b. Involve Law Enforcement
    - c. Involve severe injury or death of a participant

## FACILITIES AND OPERATIONS

1. Providers are permitted to prohibit the possession and/or use of weapons, alcohol, and/or illegal drugs on the site.
  - a. Provider must, however, establish Harm Reduction policies, practices, and procedures designed to minimize negative consequences resulting from participants' use or possession of contraband items as referenced above
  - b. Harm Reduction is not intended to prevent the termination of a participant whose actions or behavior constitute a threat to the safety of participants and/or staff
2. Provider must ensure 24-hour security.
3. Engage and maintain "Good Neighbor" relationships and interactions.
  - a. "Good Neighbor" policy shall be reviewed by Washington County Housing.
4. Participants must have equitable access to laundry services.
5. Participant rooms must be cleaned at minimum one time per week.
6. Site lobby, community areas, hallways, elevators, and entrance ways must always be clean and maintained.
7. All vandalism must be cleaned, and site must maintain a clean external and internal appearance.
8. Provider must have or provide access to a phone which participants can use within reasonable limits.
9. Provider must have the ability to store participants' belongings requiring a secured and locked storage and have policies and procedures for the return of funds and/or possessions held on behalf of a participant within twenty-four (24) hours of the participant's request.
10. In the event of a medical need, provider must refer participants to a medical facility or clinic for health examinations, emergency treatment, and follow-up visits.
11. Provider must promptly and appropriately respond to medical problems of participants and staff.
  - a. Provider must ensure regular training is provided to staff and volunteers about common physical and mental health problems of people experiencing homelessness and how to obtain needed and appropriate services
12. Provider must adopt and comply with the County's COVID protocols and procedures. Provider must have written action plans for responding to active COVID cases within the shelter.

13. Provider must allow for access in and out of the shelter between 6 a.m. and 8 p.m. and accommodate alternate access for anyone who may have employment and/or other important scheduling needs outside of those designated hours.
14. Health and Fire Inspections: Provider understands and agrees that City/County may have the appropriate Department of Public Health or Fire inspect the contracted service sites, including shelters and supportive service sites, as often as once (1) every three months or upon receipt of a complaint to determine if the facility is sanitary, healthful, and otherwise safe for its intended or actual use.
  - a. Provider must be provided with a written report as to the conditions at/of the facility and must either correct all deficiencies within thirty (30) calendar days of receipt of the report or request an extension of time from the appropriate Public Health or Fire Department to make such corrections. Provider must forward a copy of the Health or Fire Department’s response to DHS. Failure to permit inspection or rectify the defect(s) in a timely manner will be considered a material breach of this contract and will result in DHS taking remedial actions up to and including termination of this Agreement

**PERFORMANCE TARGETS**

Shelter	Target Goal	Rationale
Shelter bed occupancy rate	90%	Supports system utilization
% of positive exits from shelter within 100 days	75%	Supports Work Plan goal: Reduce average stay in shelter programs to less than 100 days, increase exits to housing to 75%
Providers shall update the service participant’s record in HMIS within three business days of any changes. This includes updates to: (a) participant’s standardized assessment (b) participant’s housing status (c) services provided to the participant (including attempted contact for referrals and enrollment into shelter) (d) financial assistance provided to the participant	No more than 3 business days	Supports Data Timeliness
Providers must regularly monitor data integrity and make data quality corrections as needed. Providers are responsible for maintaining a data quality score of 95% across all required reports outlined in the Data Quality Plan.  Regular reports will be provided to monitor Program Specific data integrity.	95%	Supports Data Quality



## 2023-2024 Washington County Supportive Housing Services Inclement Weather Shelter Program and Resource Team Attachment A-4.2 Scope of Work

### SCOPE OF WORK (SOW)

This Scope of Work is the contractual requirements to which the Inclement Weather Shelter providers must adhere. This document is not a standalone document and works in conjunction with the Work Order and Program Standards.

### PROGRAM COMPONENT OVERVIEW

Inclement Weather Shelter Program is a low barrier 24-hour shelter program that serves homeless adult during severe weather events when the environment poses a threat to health and safety to those living outside.

The Inclement Weather Shelter Program provider shall:

- Provide high quality services with a person-centered approach that includes excellent customer service that is sensitive to the challenges that persons experiencing homelessness face as they move into and maintain supportive housing
- Center all work in Housing First, Trauma-Informed Care, Harm Reduction, and culturally responsive, participant-centered approaches
- Provide access to Inclement Weather Shelter beds until the severe weather event has subsided
- The resource team will support other inclement weather shelter locations or support transportation needs

### ENROLLMENT

1. Provider will activate beds and accept participants to the Inclement Weather Shelter Program in response to extreme cold, heat or air quality. Criteria thresholds are set by regional standards with input from Public Health, Emergency Management and Housing.
2. No provider shall establish policies and assessments that screen out or exit households based on any of the following criteria:
  - 2.1. Lack of sobriety
  - 2.2. Lack of income
  - 2.3. The presence of mental health issues, disabilities, or other psychosocial challenges
  - 2.4. Challenges in gathering eligibility documentation
  - 2.5. Lack of commitment to participate in treatment
  - 2.6. Criminal background
  - 2.7. Presence or number of evictions
  - 2.8. Lack of Service Animal/Emotional Support Animal (ESA) documentation
  - 2.9. Past program participation or previous stay at provider facilities
  - 2.10. Any barriers identified by the provider
3. Provider shall not enroll any participant in need of hospitalization or skilled nursing care. Participants must be able to manage Activities of Daily Living (i.e., ability to transfer in and out of a bed; bathe and dress themselves; and address hygiene needs independently).



## SERVICE PROVISION

The provider shall provide Inclement Weather Shelter in accordance with procedures approved by Washington County Department of Housing Services (DHS), aligned with the Washington County Supportive Housing Services Program Standards, and consistent with laws, regulations, and current best practices and standards.

Providers providing Inclement Weather Shelter for persons experiencing homelessness, are funded for and must provide those services specifically needed by, and requested by, each participant. Each participant must be individually assessed for the types of services needed. The services that can be provided are listed below but are not limited to this list.

1. Direct Supportive Services: Providers providing Inclement Weather Shelter are funded for and must provide the following services directly to participants in the program:
  - 1.1. Twenty-four (24) hour bed/unit availability
  - 1.2. Program supervision
  - 1.3. Crisis intervention and conflict resolution
  - 1.4. Twenty-four (24) hour security
  - 1.5. Three meals per day and snacks
  - 1.6. Access to restrooms- restrooms maybe supplied by Department of Housing at certain locations
  - 1.7. Transportation as needed
  - 1.8. Program intake
  - 1.9. Access to Phase One Assessment
  - 1.10. Additional services as requested
2. Employ best practices in the provision of tailored services to meet the needs of specific subpopulations and cultures (Transition Age Youth, families, older adults, veterans, Black, Indigenous, and People of Color (BIPOC), LGBTQIA, and other marginalized cultures).

## FACILITIES AND OPERATIONS

1. Providers are permitted to prohibit the possession and/or use of weapons, alcohol, and/or illegal drugs onsite.
  - 1.1. Provider must, however, establish Harm Reduction policies, practices, and procedures designed to minimize negative consequences resulting from participants' use or possession of contraband items as referenced above
  - 1.2. Harm Reduction is not intended to prevent the termination of a participant whose actions or behavior constitute a threat to the safety of participants and/or staff
2. Site lobby, community areas, hallways, elevators, and entrance ways must always be cleaned and maintained.
3. All vandalism must be cleaned, and site must maintain a clean external and internal appearance.
4. In the event of a need, provider must refer participants to a medical facility or clinic for health examinations, emergency treatment, and follow-up visits.
  - 6.1. Provider must promptly and appropriately respond to medical problems of participants and staff
  - 6.2. Provider must ensure regular training is provided to staff/volunteers about common physical and mental health problems of people experiencing homelessness and how to obtain needed and appropriate services
5. Providers must adopt and comply with the County's infectious disease protocols and procedures.
6. Provider must incorporate program participation guidelines that serve as protocols for ensuring the safety and security of program participants as well as program staff.
  - 8.1. Program participation guidelines must be participant-centered to minimize barriers to accessing an Inclement Weather Shelter bed and prevent/minimize exits from program due to rule violations
  - 8.2. Program participation guidelines should address safety and security concerns, and any agency policy and procedure for search and seizure of property (search and confiscation of weapons and other contraband)

7. Health and Fire Inspections: Provider understands and agrees that City/County may have the appropriate Department of Public Health or Fire inspect the contracted service sites.
8. Provider must participate in all required communications, meetings, and reporting as requested by Washington County.

### RECORDS, FORMS, AND RECORD KEEPING

The Provider shall generate and maintain retrievable program records, including records relating to each Inclement Weather Shelter participant who receives services. If hard files are utilized, the provider shall ensure appropriate safeguards are always implemented not secure participants' Protected Health Information (PII) in compliance with HIPAA regulations. These records shall include, but not limited to, the following:

1. Provider must develop and document Policies and Procedures for exiting participants from the Inclement Weather Shelter Program.
  - 1.1. Provider may exit the participant from enrollment in Inclement Weather Shelter or if the participant is deemed a risk to the safety of the provider's staff or other participants
  - 1.2. Procedures must align with Section C.9.
  - 1.3. This must be documented in an Incident Report and reported to Washington County on the next business day
2. Provider must maintain an Enrollment Log.
  - 2.1. This must include a daily roster of participants who utilized Inclement Weather Shelter beds. This document must be sent to the County after the period of activation is over
3. All forms and Policies and Procedures must be presented to Washington County staff for approval.



## 2023-2024 Washington County Homeless Services Division Housing Liaison Services Program Attachment A-4.3 Scope of Work

### SCOPE OF WORK (SOW)

This Scope of Work is the contractual requirements to which the Housing Liaison (HL) providers must adhere. This document is not a standalone document and works in conjunction with the Work Order and Program Standards. Washington County Supportive Housing Services Department maintains the right to make changes related to prioritization, matching and other aspects of the implementation of the complete system. Programs will be notified through policies, interim guidance, and other forms of communication when deemed necessary. Programs must be in compliance with all local, state and federal laws constituted to protect against discrimination and harassment and relative to privacy, confidentiality, and financial management of grant funds.

### PROGRAM OVERVIEW

The HL program will fill a critical gap in services to households and individuals struggling with housing insecurity and/or homelessness who interact with the Department of Health and Human Services support provided by the County. While the immediate goal of this program is to help persons and households connect to housing services or permanent housing, this Housing Liaison Program is designed to be a short-term intervention that primarily works with the County staff to assist them with resolutions for their participants. The Housing Liaisons will work alongside the following Washington County Health and Human Services (HHS) Divisions/Programs: Maternal Child and Family Program, Behavioral Health's Intensive Care Coordination Program, Developmental Disability Division, Hawthorn Walk-In Center, and Disability, Aging, and Veterans Services Division. Staff members of the above-mentioned HHS programs and divisions will work closely with the Housing Liaisons to address the housing needs of participants receiving services through the HHS programs. Housing Liaisons will serve as "Subject Matter Experts" to these programs/divisions to answer questions, offer information, and assist with navigating housing resources as well as provide direct assistance to referred participants when necessary. It is expected that program staff will assist on participants' behalf for no more than 90 days. The participants supported and served by the Liaison will be people and/or households who meet eligibility under Population A and B definitions of the [Metro Supportive Housing Service Program Work Plan Addendum C](#), pages 20-21.

### HOUSING LIAISON STANDARDS OF CARE

Housing Liaison providers shall:

- Follow the standards of high-quality housing services with a person-centered approach that includes excellent customer service sensitive to the challenges that persons experiencing homelessness face as they move into and maintain stable housing.
- Be flexible in intensity in order to meet the individual needs of each participant. Intensity shall be regularly monitored and adjusted as needed following best practices in a modified Critical Time Intervention and Progressive Assistance model of providing services.
- Maintain thorough working knowledge of housing services and resources within Washington County to best advise HHS staff and assist participants in getting connected to appropriate services.
- Develop and maintain collaborative, professional relationships with the HHS program or division staff providing services where the Liaison position is embedded.
- Build a thorough working knowledge of the resources and services offered through the HHS program or division where they are embedded to better connect housing services recipients into services when

appropriate.

- Employ best practices in the provision of tailored services to meet the needs of specific subpopulations and cultures (Transition-Aged Youth, Families, Older Adults, Veterans, Black, Indigenous, and People of Color (BIPOC), and other marginalized cultures).

## ELIGIBILITY FOR SERVICES

### 1. Persons who meet the eligibility of Population A and B.

#### 1.1 Population A definition:

- 1.1.1 Household is earning between 0-30% AMI; **AND**
- 1.1.2 Head of household has a disabling condition. This can include a physical, psychological, or cognitive disability, a chronic illness, or addiction. This is self-identified. The disability does not need to be diagnosed or documented by a third party; **AND**
- 1.1.3 Head of household is currently:
  - a. Literally homeless (staying in a tent, car, emergency shelter, transitional housing or hotel); **OR**
  - b. In an institution or publicly funded system of care (e.g. hospital, jail or prison, foster care); **OR**
  - c. In housing and will become literally homeless within 14 days of the date of application for homeless assistance or has received an eviction (this includes households who are involuntarily doubled up);
  - d. Is fleeing or attempting to flee domestic violence, dating violence, sexual assault, stalking, trafficking, or other dangerous or life-threatening conditions that relate to violence and lacks the resources or support networks to obtain other safe, permanent housing; **AND**
- 1.1.4 Head of household meets one or more of the following criteria:
  - a. Has been literally homeless, institutionalized and/or in a publicly funded system of care, involuntarily doubled-up for a combined total of 12 or more months over the past 3 years, **OR**
  - b. Was housed through another Homeless Assistance Housing Program in the last three years and is not currently being served in that program; **OR**
  - c. someone that is being served in an intensive case management program (e.g. ACT)

#### 1.2 Population B definition:

- 1.2.1 Household is earning between 0-50% AMI; **AND**
- 1.2.2 Head of household is currently:
  - a. In an institution of publicly funded system of care (e.g. hospital, Jail, prison, or foster care) **OR**
  - b. Literally homeless (staying in a tent, car, emergency shelter, transitional housing or hotel); **OR**
  - c. Household is involuntarily doubled up **OR**
  - d. Household is staying in a temporary motel utilizing their own funds **OR**

- e. In housing and will become literally homeless within thirty (30) days of the date of application for homeless assistance, (including being asked to leave a doubled-up situation), **OR**
  - f. Has received an eviction notice, **OR**
  - g. Is currently residing in a Transitional Housing Program, **OR**
  - h. Is fleeing or attempting to flee domestic violence, sexual assault, dating violence, stalking or human trafficking
2. See additional eligibility information in Appendix II, page 10.
  3. Programs are responsible for documenting homelessness status, imminent risk of homelessness, disabling condition and income and entering the documentation into the Homeless Management Information System (HMIS) system. Documentation can consist of readily available firsthand documents (such as letter from SSA) or, if no documentation is available, the Washington County Self-Certification Form is sufficient. Housing Liaison Programs may get documentation from the referring agency.
    - 3.1 While the above documentation is important, no participant will be refused assistance in finding housing due to lack of required documentation. If the person cannot verify their income and housing status, they may complete a self-declaration form.
  4. Programs shall NOT establish policies, assessments or practices that screen out participants or deny them referrals based on any of the following criteria:
    - Lack of income or employment
    - Lack of identification
    - Presence of mental health, disabilities, or other psychosocial challenges
    - Lack of commitment to participate in treatment
    - Criminal background
    - Presence of or number of evictions
    - Any other “criteria” thought to predict challenges/barriers/success to long-term housing success or generally considered “hard to work with”

## SUPPORTIVE SERVICES AND ACTIVITIES

1. The Housing Liaison Program shall include, but is not limited to, the following authorized activities: housing needs assessment; service planning; warm hand-off connections to appropriate housing services programs; collaboration with HHS program and division staff and other services as needed and requested by the HHS staff; and follow-up; crisis management; negotiations with landlords.
2. Housing Program Referrals: HL programs must work to identify resources and develop relationships with housing service providers to facilitate seamless service referrals for participants and establish communication channels to reconnect participants into services when needed.
  - 2.1 Housing Liaisons will be familiar with all affordable housing options available in the County and know the process for helping participants to get on the waitlist.
  - 2.2 Housing Liaisons will have working knowledge of all housing resources and interventions funded through Washington County Department of Housing and specifically the Homeless Services Division and know

the process for helping participants access these resources.

- 2.3 Housing Liaison activities include but are not limited to:
  - 2.3.1 Providing warm hand-off referrals to appropriate Washington County housing programs such as HCMS, Rapid Re-Housing, Rapid Resolution, and shelter services.
  - 2.3.2 Consulting with HHS programs or divisions on best course of available support for participants.
  - 2.3.3 Providing short term direct services to help participants obtain appropriate connections to community resources.
3. Before connecting a referred participant to housing resources, the Housing Liaison will confer with HHS staff to assess whether the participant has the means (financially and socially) to maintain the cost of their unit on their own. The Liaison may determine financial and social stability through working directly with the participant.
  - 3.1 This will include ensuring an income assessment and preliminary household budget has been completed to predict what rental amount will be affordable.
  - 3.2 If the Housing Liaison, HHS staff, and the referred participant make the determination that they cannot afford a unit on their own, then the Housing Liaison will refer the participant to one of the County's supportive housing programs such as RLRA, Rapid Re-Housing, Rapid Resolution or other available voucher or affordable housing programs.
4. Housing Liaisons will serve as "Subject Matter Experts" to consult with HHS program or division staff about possible housing solutions and/or supports that might fit the needs of their various participants. In order to provide this support, Housing Liaisons should establish a weekly "case conferencing" meeting with HHS staff to discuss participants and plan together for the best support and course of action.
  - 4.2 Housing Liaisons may host information sessions to brief HHS program or division staff on housing resources, processes, and other relevant housing services knowledge. Subject matter may vary depending on population needs and barriers to housing stability.
5. Provide eviction prevention counseling, advocacy, intervention, and linkage to no-cost legal providers to develop and implement strategies to respond to impending serious housing crises or specific legal challenges that participants may be experiencing. Make referrals to Washington County affiliated programs providing eviction prevention funds.
  - 5.1 Work with property management staff, SHS partners, and HHS staff to help participants resolve issues that threaten their housing stability. Meet jointly with participants, property management staff, other appropriate partners, and care team members to address chronic and acute issues and develop plans for improvement that result in housing stability.
6. Housing Liaison services shall always be participant-centered and voluntary. It is the responsibility of the Liaison to ensure successful engagement with any referred participant.
  - 6.1 Programs must have policies and procedures that manage the monitoring and coordination of the use and disbursement of financial assistance including: the process for ensuring that all payments are timely and that payments are paid to appropriate parties. This also includes timely and accurate data entry in the HMIS system and documentation of financial expenditures. Programs will not provide financial assistance directly to any program participant, rather will ensure that landlords, utility providers, and other such services are paid directly.

7. The provider shall provide Housing Liaison services in accordance with procedures approved by Washington County Department of Housing Services (DHS), aligned with the Washington County Supportive Housing Services Program Standards, and consistent with laws, regulations, and current best practices and standards.
8. At the discretion of the Homeless Services Division Contract Manager, provision of additional services and/or activities may be required. See additional eligible support services in Appendix I, page 8.

## ENROLLMENT

1. Provider will process and accept referrals from HHS programs and divisions as listed in this SOW.
2. Provider must meet with referred participant within three (3) business days following referral.
3. Before enrolling or connecting a new participant, provider shall check HMIS to assess whether the participant is already enrolled in another housing or duplicative program.
  - 3.1. If the participant is enrolled in a duplicative program, program staff will inform the participant and HHS staff that they are already enrolled in a duplicative program and contact the duplicative program and, if appropriate, develop a plan for reconnecting the participant to that program.
  - 3.2. If a program change is more appropriate for the participant, enrollment in the second program can continue if the participant requests such change and is still eligible, after the participant is exited from the original program.
  - 3.3. Participants who are not already enrolled in a housing program should be entered into HMIS and enrolled in the Housing Liaison Program.
4. If not yet already completed, or if it has been over 90 days since screening was last completed, provider shall complete the initial Community Connect phase I assessment before referral to a housing intervention to verify service eligibility.
5. Provider shall establish rapport and build a trusting relationship with direct care providers in the HHS program or division where they are embedded. They may work with the service provider or potential participant to determine if the participant is suitable for available homeless services programs.
6. Provider shall work with HHS staff to obtain all appropriate Releases of Information (ROI) for the participant to allow effective communication with system partners and other service providers/agencies to assist participants with linkages to resources, services and benefits, coordination of services, participant advocacy, etc. This includes ROIs for the Homeless Management Information System (HMIS) as well as any agency-specific ROIs.
7. Provider must provide guidance and support to HHS staff about the required documents a participant will need for housing search and attainment. Provider may work directly with participants to assist in gathering documents if the referring department/program cannot assist.

## CASE CONFERENCING

1. Providers shall facilitate and organize case conferencing meetings with HHS program or division staff weekly to discuss the needs of current participants whom agency staff have questions about. Case conferencing should include the following activities:
  - 1.1. Discussion of participant's housing needs and Liaison services provided to the participant.

- 1.2. Establish via HMIS whether participant has been connected to housing services previously and if the connection can (and/or should) be re-established.
- 1.3. Determine HHS staff's capacity to assist the participant with achieving housing stability and develop a plan for who will be responsible for which actions with or for the participant, including whether the Liaison should work directly with the participant.

## COLLABORATIVE HOUSING SUPPORT PLAN

1. As the provider works with HHS staff, they must jointly develop a Housing Support Plan that will be discussed and share with the involved participant. The Housing Support Plan will be a short and straightforward plan that outlines action steps, which party is responsible for those actions, and timeframes in which to complete the steps.
2. The Support Plan shall be participant-centered and change as needed over the course of working together with the participant.

## RECORDS, FORMS AND RECORD-KEEPING

1. The Provider shall generate and maintain retrievable program records, including records relating to each Housing Liaison intervention. Records do not need to be hard files and can be digitally uploaded into HMIS to relieve the burden of hard files. If hard files are utilized the provider shall ensure appropriate safeguards are implemented to secure participants' Protected Health Information in compliance with HIPAA regulations. Records are most likely to be obtained from HHS staff, not the participant. These records shall include, but not be limited to, the following when needed and collected:
  - 1.1. Release of Information form for HMIS (ROI) (**required**)
  - 1.2. Grievance Policy and Procedures with signed acknowledgment by participant and any submitted grievances
  - 1.3. Assessments (**required, but can be received by referring agency**)
  - 1.4. Eligibility documents (as relevant):
    - Identification (**required**)
    - Disability
    - Income
    - Housing Status verification (**can be self-certification or documentation from referral source**)
  - 1.5. Housing Support Plans (**can be in notes section of HMIS**)
  - 1.6. Release of Information for communication between Housing Liaison and HHS program staff
  - 1.7. Incident Reports
  - 1.8. Case Closure Documentation (e.g., final case notes and reason for case closure/" exit")
2. See Appendix II, page 9 for additional record-keeping and eligibility information.



## PERFORMANCE TARGETS

Housing Liaison Program		
No.	Performance Target Details	Target Goal
1.	<ul style="list-style-type: none"> <li>% of enrolled households with active and complete Phase I Community Connect Assessment.<sup>1</sup></li> </ul>	95%
2.	<ul style="list-style-type: none"> <li>% of Housing Liaison referred participants with positive or neutral program exits.<sup>2</sup></li> </ul>	70%
3.	<ul style="list-style-type: none"> <li>% of Households with no less than 2 service transactions per month per participant. Service transactions should detail case notes and housing support plan.</li> </ul>	80%
4.	<ul style="list-style-type: none"> <li>Weekly meetings with program staff where Liaison is embedded for the purposes of case conferencing shared participants.</li> <li>Measured by having no less than 4 case conferencing sessions per month.</li> </ul>	80%

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<sup>1</sup> Complete Phase I assessments include accurate and complete referrals to short, medium, and long-term housing programs when appropriate for participants

<sup>2</sup> Positive exit destinations include: Permanent housing/housing enrollment, self-resolution of housing need, transitional housing placement, existing housing placement sustained etc.

Neutral exit destinations include: Institutional settings, doubled-up, deceased, temporary housing placement, shelter etc.

## APPENDIX I

### Eligible Supportive Services

Supportive Services	Guidance
<b>Information and Referral</b>	<ul style="list-style-type: none"> <li>• Assessing, arranging, coordinating, securing, and monitoring the delivery of individualized services to participants of mainstream services</li> <li>• Assisting with obtaining Federal, State, and local benefits</li> <li>• Providing information and referrals to other providers</li> <li>• Support associated with the housing search, attainment and move-in process as needed</li> <li>• May provide support for up to 3 months (if necessary)</li> <li>• Must meet with colleagues in case-conferencing-type sessions once a week</li> </ul>
<b>Employment Assistance &amp; Job Training</b>	<ul style="list-style-type: none"> <li>• Provide information and referral about job attainment, job readiness, etc.</li> </ul>
<b>Food</b>	<ul style="list-style-type: none"> <li>• Provide some gift cards for food if needed</li> </ul>
<b>Housing Search &amp; Counseling Services</b>	<p>Assist agencies in understanding the housing landscape including:</p> <ul style="list-style-type: none"> <li>• Housing search</li> <li>• Tenant counseling</li> <li>• Understanding leases</li> <li>• Budgeting</li> <li>• Making moving arrangements</li> <li>• Mediation with property owners and landlords</li> <li>• Credit counseling referrals, accessing a free personal credit report, and resolving personal credit issues</li> <li>• Connection to non-profit credit resolution program for debt relief</li> <li>• Payment of rental application fees, Security Deposits and other required fees associated with moving in as needed</li> </ul>
<b>Life Skills</b>	<ul style="list-style-type: none"> <li>• Referrals to critical life management skills that may have not been learned or have been lost during the course of their life and are necessary to function independently</li> </ul>

## APPENDIX II

### Additional Record Keeping Information

Category	Guidance
<b>Phase I Assessment</b>	<ul style="list-style-type: none"> <li>• Conduct in HMIS</li> </ul>
<b>Prioritization</b>	<ul style="list-style-type: none"> <li>• Prioritization should always be the person with the greatest need, highest barriers, and most vulnerability</li> </ul>
<b>Participant Identification</b>	<ul style="list-style-type: none"> <li>• Housing Liaisons should get copies of identification from the agency(ies) with whom they are coordinating. If a participant does not have identification at the time of program screening, program must not deny enrollment into the program and assist the participant in obtaining whatever ID is needed after enrollment.</li> <li>• <b>A copy of a Social Security Card is not a requirement</b></li> </ul>
<b>Geography</b>	<ul style="list-style-type: none"> <li>• Household must be a current resident of Washington County residing within the <a href="#">Metro Urban Growth Boundary</a>. If the person reports that they slept within the County geographic boundaries the previous night, they meet the requirement that they are a resident of Washington County.</li> </ul>

### APPENDIX III

#### Eligible Expenses Guide

Financial Assistance	Guidance	Required Documentation
Application Fees	Eligible costs include applications, background checks, and credit check score fees. Tenant Screening Reports (TSR) are available to provide to landlords to avoid application fees. Limited to \$200 per household.	<ul style="list-style-type: none"> <li>• Receipt</li> </ul>
Identification Documents	Documentation acquisition fees such as for birth certificate, document court filing fees, identification, driver's license or other documents needed for employment or housing. Limited to \$250 per household.	<ul style="list-style-type: none"> <li>• Receipt</li> </ul>
Transportation	Public transportation is an eligible cost if it is related to employment or housing search. Maximum assistance of two (2) total, one (1) month Trimet passes. Liaison may also provide up to \$50 in gas gift cards as needed for housing or employment related purposes in lieu of Trimet passes.	<ul style="list-style-type: none"> <li>• Receipts for transportation passes/tokens/gift cards purchased.</li> </ul>
Food and Hygiene Items	For the immediate resolution of lack of basic needs and/or food insecurity, liaisons may purchase items as needed. Basic needs include food, baby food, diapers, clothing hygiene supplies feminine supplies, paper products, OTC medications. Maximum assistance is \$250 per household.	<ul style="list-style-type: none"> <li>• Copy of receipt for items purchased. Copy of receipt for purchase of gift cards.</li> </ul>
Essential Household Items	Items that are necessary to meet basic needs within a housing unit. Items may include appliances such as a fan, portable or window air conditioning, or microwave. Items such as warm bedding, bath towels, dish cloth, sheets, pillows, pillowcases, and shower curtains are allowed. Cleaning supplies including a trash can, trash bags, broom & pan, cleaner, mop + pail, laundry detergent, sponges, toilet paper, & dishwashing liquid are permitted. Household item expenses should not exceed \$200 per household.	<ul style="list-style-type: none"> <li>• Copy of all receipts that includes the items purchased. If gift cards are used, receipts must be provided that includes the items purchased.</li> </ul>
Legal Fees	For the immediate resolution of legal barriers to housing – including fines, court fees, etc. Maximum assistance is \$150 per household.	<ul style="list-style-type: none"> <li>• Receipt for any expenses</li> </ul>
Reunification Assistance	Expenses paid directly to a transportation provider for relocation by bus, train, or plane, to reunify participant with family members who have agreed to provide housing outside Washington County. Transportation mode selected must be the most cost-effective option available. Providers can use	<ul style="list-style-type: none"> <li>• Receipt for any expenses</li> </ul>

	<p>discretion regarding fuel cost for participants with automobiles seeking reunification assistance.</p> <p>In these cases, the provider must document mileage, estimate fuel costs, and provide gas cards for needed fuel. All reunification cases must meet documentation standards regarding cost and the destination must be for an actual housing option. Reunification costs must not exceed \$400 per household.</p>	
Moving Costs	Cost of van rental or moving services. Limited to \$300 per household.	<ul style="list-style-type: none"> <li>• Receipt and detailed bill</li> </ul>
Late Rent Fees	Cost of fee for late rent payment. Costs do not include payment of monthly rent. The assistance should not be provided more than once in a 12 month period.	<ul style="list-style-type: none"> <li>• Copy of documentation verifying late rent payment fee. Proof of payment.</li> </ul>
Utility Assistance	One-time utility assistance to prevent loss of housing. Eligible utilities include gas, electricity, water, sewage, and trash. Assistance may include a utility deposit to begin services. Utility assistance should not exceed \$500 per household.	<ul style="list-style-type: none"> <li>• Copy of bill for each utility paid for.</li> </ul>
Utility Arrears	<p>Liaison may provide funds only if necessary for a household to immediately obtain or retain housing; maximum one (1) month of arrears per utility. If liaison is only covering arrears for one utility bill, up to three (3) months of arrears may be provided.</p> <p>Eligible utilities include gas, electricity, water, sewage, &amp; trash. Utility arrears should not exceed \$250 per household.</p>	<ul style="list-style-type: none"> <li>• Statement or bill that includes the cost of each month or bill paid.</li> </ul>
Employment related items	Items needed to assist in securing or beginning employment or an employment training program. Items may include a one-time purchase of a cell phone, appropriate footwear, specialized clothing items, and accessories. Items should be limited to \$300 per household. <i>*Liaison should endeavor to coordinate with the employer, a local Worksource office, or an employment training organization to determine if they can provide financial assistance for workforce related items prior to issuing payment.</i>	<ul style="list-style-type: none"> <li>• Receipt and detailed bill</li> </ul>



## 2023-2024 Washington County Supportive Housing Services Rapid Re-Housing & Homelessness Prevention Program Attachment A-4.4 Scope of Work

### SCOPE OF WORK (SOW)

This Scope of Work is the contractual requirements to which the Enhanced Rapid Re-Housing (ERRH) providers must adhere. This document is not a standalone document and works in conjunction with the Work Order and Program Standards. Washington County Supportive Housing Services Department (SHS) maintains the right to make changes related to prioritization, matching and other aspects of the implementation of the complete system. Programs will be notified through policies, interim guidance, and other forms of communication when deemed necessary. Programs must comply with all local, state and federal laws constituted to protect against discrimination and harassment and relative to privacy, confidentiality, and financial management of grant funds.

### ENHANCED RAPID RE-HOUSING PROGRAM OVERVIEW

Enhanced Rapid Re-Housing Programs are a Housing First, Low Barrier, Harm Reduction, Crisis Response program focused on quickly resolving the housing crisis of eligible participants. ERRH case managers use Progressive Assistance to help program participants rapidly resolve current barriers and/or obtain and retain permanent housing in either the private rental market or affordable housing market as available. Enhanced Rapid Re-Housing programs design service provision based on the core components of: Current housing barrier resolution; housing identification, rent & move-in assistance, and case management and supportive services. Enhanced Rapid Re-Housing Programs are expected to be aligned with National Alliance to End Homelessness Program Standards for RRH [Rapid Re-Housing Tool Kit](#).

**Enhanced Rapid Re-Housing** work focuses case management and rental assistance on serving those persons who are currently experiencing a housing crisis through focused efforts with an emphasis on services that assist participants in finding new permanent housing and then meeting their responsibilities as tenants and in complying with a standard lease agreement. Enhanced Rapid Re-Housing's eligible population falls into the definitions provided by The Metro Regional Council and the Washington County SHS which includes households between 0 and 50% of the Area Median Income for Washington County, and are currently homeless; exiting an institution of care; are involuntarily doubled up; are staying in a motel utilizing their own or public funds; persons who face imminent homelessness; or those persons who are within fourteen (14) days of losing their housing or have received an eviction order from a court.

ERRH providers shall:

- follow the standards of a best practices in ERRH with a person-centered approach that includes excellent customer service sensitive to the challenges that persons experiencing homelessness face as they move into and maintain supportive housing;
- ensure that services are flexible in intensity in order to meet the individual needs of each participant. Intensity shall be regularly monitored and adjusted as needed following best practices in a modified Critical Time Intervention and Progressive Assistance model of services provision;
- employ a "whatever it takes" and "meet them where they are" approach to working with participants in their transition from a housing crisis to permanent housing and longer-term retention; and
- Will receive referrals through the Community Connect system (the other 50% can be obtained through self-referral). Referral percentages will be monitored by DHS and can be adjusted to ensure equitable distribution

of resources and systems need.

## DEFINITIONS

- 1) Enhanced Rapid Re-Housing: connects families, individuals, and youth experiencing a housing crisis to permanent housing through a tailored package of assistance that may include the use of time-limited financial assistance and targeted supportive services. Enhanced Rapid Re-Housing programs help families, individuals and youth in a housing crisis solve the practical and immediate challenges to obtaining permanent housing while reducing the amount of time they experience homelessness, avoiding a near-term return to homelessness, and linking to community resources that enable them to achieve housing sustainability in the long-term. Enhanced Rapid Re-Housing is an important component of a community's response to homelessness.
- 2) Progressive Engagement/ Assistance is an approach for providing case management services and financial assistance in permanent housing programs. This approach seeks to provide only the amount of assistance necessary to assist each participant reach housing permanence, not more. Progressive Assistance starts when staff first meet their participant and begins the process of assessing the person's strengths and housing barriers. Staff should continually assess how much a participant can do on their own at every meeting. Services are provided in sync with the varied and changing needs of the participant. While there are minimum standards of contact with participants in ERRH, staff may find that many participants need a greater level of contact, especially in the early days of housing search and after move-in.
- 3) Warm Hand-Off is a participant- centered approach to making referrals to services and support agencies. Due to the usual trauma that most housing crisis participants are experiencing, making a referral by simply explaining what it is and giving them a phone number to call leaves open a high likelihood of an incomplete connection.

## ELIGIBILITY FOR SERVICES

- 1) **ERRH**: Households must be determined to be in a housing crisis and in need of assistance.
- 2) Households must meet the following eligibility criteria:
  - a. Income: between 0 and 50% AMI for Washington County, **AND**
  - b. Is currently
    - i. homeless according to HUD's Final Rule Defining Homelessness (Categories 1 & 4) (24CFR parts 91, 576 and 578), **OR**
    - ii. exiting an institution of publicly funded care (e.g. hospital, rehabilitation, jail, prison, or foster care) and will be homeless at exit, **OR**
    - iii. is involuntarily doubled up, **OR**
    - iv. is temporarily staying in a motel utilizing their own funds, **OR**
    - v. is fleeing or attempting to flee domestic violence, dating violence, sexual assault, stalking, trafficking or other dangerous or life-threatening conditions that are related to violence and they lack the resources or support networks to obtain safe, permanent housing, **OR**
    - vi. is in a Transitional Housing Program, **OR**
    - vii. is in housing and will become literally homeless within 14 days of the date of application for assistance (including being told to leave an involuntarily doubled up housing situation) or has received an eviction notice.

- 3) Programs are responsible for documenting homelessness status and income and entering the documentation into the HMIS system
  - a. If/when there is a reported increase or decrease in income, programs must update information in HMIS.
  - b. Agency must have policies and procedures for how to handle changes in income in the ERRH program especially as it relates to the rent-sharing percentage paid by the household in ERRH.
  
- 4) Programs shall NOT establish policies, assessments or procedures that screen out participants or deny them assistance based on any of the following criteria:
  - Lack of income or employment;
  - Lack of identification documentation;
  - Presence of mental health, disabilities, or other psychosocial challenges
  - Lack of sobriety
  - Lack of a commitment to participate in treatment
  - Criminal background
  - Presence of, or number of evictions
  - Any other “criteria” thought to predict challenges/barriers/success to long-term housing success or generally considered “hard to work with”.

## SERVICE PROVISION

ERRH support will be provided in accordance with procedures approved by Washington County Department of Housing Services (SHS), aligned with the Washington County Supportive Housing Services Program Standards, and consistent with laws, regulations, and current best practices and standards.

ERRH Programs shall include, but are not limited to, the following authorized activities: outreach and engagement; intake and assessment; service planning; housing location services; housing and move-in assistance; financial assistance (one-time and on-going rental assistance) and case management support. Every program shall ensure that following base levels of support in their programs:

- 1) Intake and Assessment: ERRH programs shall first check to see if the participant is already entered into HMIS with an assessment. If not, the RRH Program shall conduct the appropriate step in the Phased Assessment.
  
- 2) Housing Identification: ERRH programs shall assist the participant with identifying appropriate housing resources that match the needs of the household. HP programs may perform the same activities in the event that a household needs to move due to affordability of their current housing.
  
- 3) Financial Assistance: ERRH programs shall provide all necessary funds to accomplish the housing search and attainment. Monthly rental assistance will be centrally administered by Washington County Department of Housing Services. HP programs have more limited use of funds.
  
- 4) Case Management: All ERRH participants will be assigned to the support of one case manager who will be the primary point of contact for the participant responsible for all referrals, communication with landlords, etc.



## OUTREACH, ENGAGEMENT, AND ENROLLMENT

1. As needed, provider will conduct Phase 1 Assessments with community members
  - Before assessing or enrolling a new household, provider shall check HMIS to assess if the household has a current Phase 1 Assessment or pending referral.
  - If the household has a Phase 1 Assessment in the system, Provider will ensure data is accurate and up to date
2. Providers will accept and enroll referrals for ERRH from Community Connect.
  - Provider must accept the referral or document one (1) contact attempt to referred household from Community Connect within three business days following referral.
  - Provider will follow the due diligence policy as outlined by DHS if they are unable to locate or contact the household.
3. Provider can directly enroll households into their ERRH program without referral from Community Connect when they have internal enrollment slots available.
  - The number of direct enrollments will be defined by DHS to ensure an equitable distribution of enrollments, regional dispersal, system need, and household need.
  - All direct enrollments must meet eligibility criteria.
4. Provider will obtain all appropriate Releases of Information (ROI) for the household to allow the effective communication with system partners and other service providers/agencies to assist households with linkages to resources, services and benefits, coordination of services, household advocacy, etc. This includes documenting receipt of the privacy script for the Homeless Management Information System (HMIS) as well as any agency-specific ROIs.
5. Provider must conduct enrollment activities with eligible households as outlined in program manual, including assisting households with gathering eligibility documentation, releases, completing intake forms, and finalizing enrollment into ERRH. Provider must collect and ensure all eligibility documentation is collected from participant within ninety (90) days of enrollment and upload all documentation to HMIS.
  - i. Identification
  - ii. Proof of income
  - iii. Homeless verification
6. Programs are responsible for necessary housing inspections and ensuring that housing meets habitability standards
7. Programs must ensure that Participants sign a lease that is in accordance with the Rental and Lease Standards as outlined in the Program Manual
8. Provider must coordinate lease and rental agreement signings and establishment of a move-in date for the participant. Including collaboration with the Washington County Housing Authority to ensure that monthly rental assistance is available after least signing. This must include timely provision of:
  - Enrollment in utilities or any deposits or arrears preventing service
  - Acquisition of furniture and supplies
  - Provision of a grocery gift card
  - Orientation about the terms of the lease and other relevant information including responsibilities of tenancy before the participant moves into the unit.
9. Provider shall assist with and coordinate all aspects of move-in and orientation of new tenants to their unit/building.

- a. Tenant orientation shall include meeting with onsite management and maintenance staff.
  - b. Staff should also assist the participant to complete a unit condition assessment within a week of move-in.
  - c. Ensuring that the participants understand the basic aspects of their lease including when rent is due and how to put in a maintenance request.
  - d. Ensure basic furnishings are available at move in or with 3 business days
10. Programs must provide support to their landlord partners to maintain a professional relationship by responding to calls of concern or for assistance in a rapid fashion; working collaboratively with landlords to address Participant lease violations; ensuring that rental payments are made on time; and providing dispute mediation for the Landlord and the Participant. This support should include regular visits to landlords/property managers to check in.

## CASE MANAGEMENT

- 1) Case Management and supportive services are provided by ERRH staff to assist participants to retain their housing. The primary objective of housing-focused Case Management is to extend support to participants, through an individualized case management relationship, that will ultimately translate into housing retention. This includes but is not limited to, support with completing housing applications, accompaniment to housing appointments and/or leasing appointments, and other support associated with the housing attainment followed by work to increase income, support the goals of the participant and pay particular attention to potential housing challenges that may occur.
- 2) Case Managers shall maintain regular and ongoing participant contact and tailor the intensity and frequency of services provided, including the frequency of face-to-face and home visits to participant's level of functioning and acuity of needs. The frequency of visits will vary and may require a minimum of three or more face-to-face visits per week at initial engagement and no less than once every month after participants have stabilized in housing and are fully engaged in supportive services.
- 3) Case management services shall always be participant-centered and voluntary. It is the responsibility of the Case Manager to ensure successful engagement with the participant. If contact stops between the Case Manager and the Participant, the Case Manager must use any means necessary to attempt to reconnect with the participant. All attempts must be documented in the case file.
- 4) Program staff must conduct a minimum of one (1) face to face visit each week until the participant is housed in RRH. Once a RRH participant has moved in, the minimum requirement is one (1) home visit each month. It is quite normal that for the first 1-3 months after a person has moved into housing to be a very stressful time. This can be an excellent time for case management support to increase to more than just the minimum.
- 5) Programs will conduct a full evaluation of the participant's progress toward goals at six (6) and twelve (12) months (and every six months as long as they are enrolled in the program). After the twelve-month re-evaluation, the program should be able to determine whether the participant needs a higher level of care than can be provided by ERRH. This might include HCMS and RLRA or other more intensive services (such as skilled nursing or assisted living).
  - a. If it is determined that the participant needs a higher level of care, the provider will conduct the Phase 4 "Move Up Assessment" and reach out to Community Connect to assess what openings may be

available for the participant.

- b. If none are immediately available, the program will continue to work with the participant in as intense of a manner as is called for until the next opening is available.
- c. As long as the participant is still fully enrolled in the Enhanced Rapid Re-Housing Program, that participant maintains their homelessness status, as well as their chronic status relative to eligibility for PSH or other housing programs.

## CASE CONFERENCING

- 1) Providers shall conduct case conferencing as a form of supervision in regular intervals that meet the needs of staff. Case conferencing can occur in concert with clinical supervision or as deemed most appropriate for the case management team.
- 2) As needed, provider may include Washington County staff and other community partners including health, mental health, and other care professionals in case conferencing in order to gather elements of the care plan and develop appropriate referrals/connections.
- 3) Providers are also expected to participate in case conferencing sessions convened by Washington County, especially when they have a need to assist a participant in moving to a different kind of program.

## FINANCIAL ASSISTANCE

- 1) Rent and Move-In Assistance: Programs must provide direct financial assistance needed to identify and maintain housing. This financial assistance includes both move-in assistance, monthly rental assistance and/or utility assistance to facilitate the Participant in being able to maintain their housing while working to increase their income.
- 2) Programs must pay security deposit of participant. Security deposits must not exceed two (2) times the monthly rental amount.
- 4) Case Managers must be flexible and individualized in establishing the amount of rent that participants will pay each month (utilizing a Progressive Assistance approach). The goal is to work with the participant to carefully and regularly increase the amount of rent paid by the participant when they can afford it in order to ensure the Participant can reasonably be able to maintain the housing once the temporary rental assistance ends.
  - a. Progressive Assistance requires that over time, the Participants will gradually assume more and more responsibility for the cost of the rent for their unit based on their ability to pay. Progressive Assistance recognizes that this increase may occur gradually, but must also be flexible enough to move backwards if the Participant faces a new financial crisis, requiring the Program to assume more of the cost of rent for the time being.
  - b. Program must provide support regarding budgeting for housing expenses by helping the Participant to understand their responsibilities as well as how to reduce costs to help maintain their housing.
  - c. Case Managers are responsible for helping participants to understand budgeting and cost savings and how to plan to allow for payment of the rent.
  - d. As a general rule, after the participant has been housed for between 1-3 months, and they have any income, it is considered a best practice to discuss and gain agreement by the Participant to pay 30% of their current

income on rent. As income increases so should their contribution towards the rent, but the 30% guide mark will not remain. Most ERRH participants will end up spending at least 50% of their income on rent.

- 5) Programs shall assist participants in meeting basic needs at move-in by securing basic furnishings and appliances if not provided by the landlord, through flex funds. Flex funds can also cover transportation vouchers, work uniforms, etc. If it is related to housing retention it is something that can be covered by flex funds. Approval of SHS is not required in order to spend flex funds in eligible categories.
- 6) Monthly Rental Assistance will be managed by/paid by the Washington County Housing Authority. Please see the Addendum on Requesting Funds or Changing Amounts of Funds in this document.
  - a. To facilitate the progressive assistance approach to rental assistance, Case Managers will have a budget and rent sharing conversation with the participants not less than every three (3) months and will use that time to suggest and process any increases or decreased in rental payments by the Housing Authority.
  - b. Programs will be able to submit requests to change the rental assistance amounts on this three-month rotation, while giving the Housing Authority a month's notice of the upcoming change.
  - c. If there is a crisis that occurs making the one-month notice impossible, there will be an emergency process.
- 7) It is critical that accurate data entry in HMIS system and documentation of financial expenditures in HMIS under service transactions be completed in a timely manner.
- 8) Programs must have policies and procedures concerning the expenditure of program funds including the following:
  - a. Programs will not provide financial assistance directly to any program Participant. For example, if the program is paying part of the utilities, they must pay those directly to the utility company.
  - b. Programs must ensure that all payments are timely. Late payments could potentially be grounds for termination of the contract.
  - c. Programs must manage payments in a manner that does not result in lease violations for the participant or other penalties related to lack of timely payment.
  - d. How to determine how much rental assistance to provide to each participant over time.
  - e. Tracking requests for payments and payments to demonstrate no fraud has occurred.

## HMIS AND PARTICIPANT RECORDS

All ERRH providers shall generate and maintain retrievable program records, including records relating to each participant that receives services. Records can be digitally uploaded into the Homeless Management Information System (HMIS) to relieve the burden of hard files. If hard files are utilized, the provider shall ensure appropriate safeguards are always implemented to secure participants' Protected Health Information in compliance with HIPAA regulations. These records shall include, but not be limited to, the following:

- 1) Each participant file must include copies of the following, but not be limited to:
  - a. Release of Information form for HMIS (ROI)
  - b. Grievance Policy and Procedures with signed acknowledgment by participant and any submitted grievances.
  - c. Phased Assessments
  - d. Eligibility documents:

- i. Identification
- ii. Income verification
- iii. Homelessness verification **Or** the self-certification form.
- e. Housing Plans (can be in notes section of HMIS).
- f. Housing documents: housing subsidy applications, lease applications, copies of leases and other milestones reached during the permanent housing lease up process and as directed by SHS.
- g. Incident Reports.
- h. Referrals or info pertaining to primary medical care, mental health services, and/or substance use disorder services. If applicable.
- i. Case Closure Documentation: The Transition Plan
- j. Any other participant documentation as required at Washington County's discretion.

## PERFORMANCE TARGETS

Enhanced Rapid Re-Housing Performance Targets			
Performance Metric	Enhanced Rapid Re-Housing	Target Goal	Rationale
Community Connect Referrals Timeline	Average Days to either enroll or make a documented contact attempt for Community Connect Referrals	3 business days	Supports Coordinated Entry efficiencies
Days to House	Average Days to Housing Move-In from Program Enrollment	70 Days	Supports Work Plan goal: Reduce average stay in shelter programs to less than 100 days, increase exits to housing to 75%
Housing Outcomes	% of RRH households that exit the program to permanent housing	80%	Supports Ending Homelessness
Increases in Income	% of RRH households that increase their income at Exit removes certain exit destinations (deceased, program transfer, institutional)	40%	Supports working with households to increase their self-sufficiency and ability to stay stably housed at program end
Average Contracted Utilization %	Average amount of the household capacity that a housing program has been contracted for that has been utilized (as measured by Households Enrolled / Contracted Household Capacity)  This will not be measured until 180 days after new contracted capacity has been added.	90%	Supports system utilization goals



# 2023-2024 Washington County Supportive Housing Services Housing Case Management Services Attachment A-4.5 Scope of Work

## SCOPE OF WORK (SOW)

This Scope of Work is the contractual requirements to which the Housing Case Management Services (HCMS) providers must adhere. This document is not a standalone document and works in conjunction with the Work Order and Program Manual.

## PROGRAM COMPONENT OVERVIEW

HCMS provides intensive supportive services for those indicated as requiring long term housing intervention using the Community Connect Phase 1 Assessment. The households served in HCMS must meet the regional definition of Population A, or be 55 years of age or older and meet the Washington County Working Definition of Population B as outlined below. In addition to locating and securing housing, HCMS shall be designed to assist households with achieving and maintaining health, mental health, and housing stability. The Housing Case Manager shall serve as the central point of contact for coordinating services for the household.

Case management services may range from highly intensive individualized support as households transition from homelessness to permanent housing to less intense support for activities related to maintaining housing and supportive services.

HCMS shall include, but is not limited to, the following authorized activities: outreach and engagement; intake and assessment; service planning and coordination; housing location services; housing and move-in/rental assistance; connections to health, mental health, behavioral health, substance use disorder services; and other wraparound services as needed and requested by the household; ongoing monitoring and follow-up; assistance with benefits establishment, transportation, and legal issues; crisis management; eviction prevention; household education (life skills, budgeting, tenancy requirements); linkage to community resources, and manage spending of financial assistance dollars (aka flex funds); coordination and collaboration with the Washington County Supportive Housing Services system of care.

## Eligibility for Services

### 1. Household is earning between 0-30% AMI; **AND**

A. Head of household has a disabling condition. This can include a physical, psychological or cognitive disability, a chronic illness, or addiction. This is self-identified. The disability does not need to be diagnosed or documented by a third party; **AND**

B. Head of household is currently:

- a. Literally homeless (staying in a tent, car, emergency shelter, transitional housing or hotel); **OR**
- b. In an institution or publicly funded system of care (e.g. hospital, jail or prison, foster care); **OR**
- c. In housing and will become literally homeless within 14 days of the date of application for homeless assistance or has received an eviction (this includes households who are involuntarily doubled up); **OR**
- d. Is fleeing or attempting to flee domestic violence, dating violence, sexual assault, stalking, trafficking, or other dangerous or life-threatening conditions that relate to violence and lacks the resources or support networks to obtain other safe, permanent housing; **AND**

- C. Head of household meets one or more of the following criteria:
- a. Has been literally homeless, institutionalized and/or in a publicly funded system of care, involuntarily doubled-up for a combined total of 12 or more months over the past 3 years; **OR**
  - b. Was housed through another Homeless Assistance Housing Program in the last three years and is not currently being served in that program; **OR**
  - c. Someone that is being served in an intensive case management program (e.g. ACT)

**OR**

2. Head of Household is 55 years if age or older **AND**
- a. Household is earning between 0-50% AMI; **AND**
  - b. Head of household is currently:
    - i. Literally homeless
    - ii. In an institution of publicly funded system of care (e.g. hospital, jail, prison, or foster care) **OR**
    - iii. Household is involuntarily doubled up **OR**
    - iv. Household is staying in a temporary motel **OR**
    - v. Household is in a transitional housing program **OR**
    - vi. In housing and will become literally homeless within 14 days of the date of application for homeless assistance or has received an eviction
3. Programs shall NOT establish policies, assessments or procedures that screen out participants or deny them assistance based on any of the following criteria:
- Lack of income or employment;
  - Lack of identification documentation;
  - Presence of mental health, disabilities, or other psychosocial challenges
  - Lack of sobriety
  - Lack of a commitment to participate in treatment
  - Criminal background
  - Presence of, or number of evictions
  - Any other “criteria” thought to predict challenges/barriers/success to long-term housing success or generally considered “hard to work with”.

## SERVICE PROVISION

The provider shall provide HCMS in accordance with procedures approved by Washington County Department of Housing Services (DHS), aligned with the Washington County Supportive Housing Services Program Standards, and consistent with laws, regulations, and current best practices and standards.

HCMS Programs shall include, but are not limited to, the following authorized activities: outreach and engagement; intake and assessment; service planning; housing location services; housing and move-in assistance; financial assistance (one-time and on-going rental assistance) and case management support. Every program shall ensure that following base levels of support in their programs:

- 1) Intake and Assessment: HCMS programs shall first check to see if the participant is already entered into HMIS with an assessment. If not, the Program shall conduct the appropriate step in the Phased Assessment.
- 2) Housing Identification: HCMS programs shall assist the participant with identifying appropriate housing resources that match the needs of the household. Programs may perform the same activities in the event that a household is currently housed but needs to move due to affordability of their current housing.
- 3) Financial Assistance: HCMS programs shall provide all necessary funds to accomplish the housing search and attainment. Monthly rental assistance will be centrally administered by Washington County Department of Housing Services.
- 4) Case Management: All HCMS participants will be assigned to the support of one case manager who will be the primary point of contact for the participant responsible for all referrals, communication with landlords, etc.

#### HCMS providers shall:

- Follow the standards of high-quality housing services with a person-centered approach that includes excellent customer service sensitive to the challenges that persons experiencing homelessness face as they move into and maintain stable housing.
- be flexible in intensity to meet the individual needs of each participant. Intensity shall be regularly monitored and adjusted as needed following best practices in a modified Critical Time Intervention and Progressive Assistance model of providing services.
- Maintain thorough working knowledge of housing services and resources within Washington County to best assist participants in getting connected to appropriate services and advise DHS staff about system gaps and needs.
- Develop and maintain collaborative, professional relationships with the Outreach, Shelter, ERRH, other HCMS Providers and DHS staff.
- Employ best practices in the provision of tailored services to meet the needs of specific subpopulations and cultures (Transition-Aged Youth, Families, Older Adults, Veterans, Black, Indigenous, and People of Color (BIPOC), and other marginalized cultures).

#### Capacity Standards

1. Housing Case Managers: Maintain a caseload ratio of one full-time equivalent (FTE) Housing Case Manager to 20 households (20:1).
  - 1.1. Requests for lower caseload ratios must be approved by the DHS Contract Lead for exceptional needs populations.
2. Retention Case Managers will have a higher ratio as outlined in the Work Order. For 2023-2024 most retention case managers will have a ratio of one FTE Housing Case Manager to 30 households (30:1).
3. Establish a system for providing on-call crisis intervention services for HCMS households. HCMS staff will ensure timely crisis response within 48 hours, to assist in resolving both household and landlord concerns.

## OUTREACH, ENGAGEMENT, AND ENROLLMENT

1. As needed, provider will conduct Phase 1 Assessments with community members
  - Before assessing or enrolling a new household, provider shall check HMIS to assess if the household has a current Phase 1 Assessment or pending referral.
  - If the household has a Phase 1 Assessment in the system, Provider will ensure data is accurate and up to date
2. Providers can directly enroll into their HCMS program without referral from Community Connect when they have



designated internal enrollment slots available.

- The number of direct enrollments will be defined by DHS to ensure an equitable distribution of enrollments, regional dispersal, system need, and household need.
  - All direct enrollments must meet DHS Population A eligibility (Appendix A), or Population B eligibility (Appendix B) if the household is fifty-five (55) years or older.
3. Provider will accept and enroll referrals for HCMS from Community Connect.
    - Provider must accept the referral or document one (1) contact attempt to referred household from Community Connect within three business days following referral.
    - Provider will follow the due diligence policy as outlined by DHS if they are unable to locate or contact the household.
  4. Provider will obtain all appropriate Releases of Information (ROI) for the household to allow the effective communication with system partners and other service providers/agencies to assist households with linkages to resources, services and benefits, coordination of services, household advocacy, etc. This includes documenting receipt of the privacy script for the Homeless Management Information System (HMIS), the RLRA release, as well as any agency-specific ROIs.
  5. Provider must conduct enrollment activities with eligible households as outlined in program manual, including assisting households with gathering eligibility documentation as needed, releases, completing intake forms, and finalizing enrollment into HCMS.

### **On-Going Support Services**

Support services shall be provided to households in a frequency and manner that complies with the program manual. All services shall be tracked in HMIS as service transactions. Service transactions will be monitored on a regular basis for compliance and alignment with program standards. The primary goals of support services are to:

1. Facilitate timely access to housing for program participants – Provide housing search and placement supports for participants to assist them in locating and securing appropriate permanent housing.
2. Ensure housing stability – Develop individualized plans to support housing retention. Ensure knowledge of tenant rights and responsibilities and serve as point of contact for landlords and property management as needed.
3. Conduct case planning and care coordination to support increased ability to retain housing independently – Utilizing the phased assessments, support participants to identify their individual strengths and needs and establish and achieve goals to increase ability to maintain housing and community supports independently.
4. Facilitate successful transitions to independent living – Prepare households to transition to lower levels of service as they become more stable.

### **Case Conferencing**

HCMS Providers shall participate in case conferencing to support coordinated care provision and system alignment including:

1. Preparing updates and summary information regarding the status of priority households
2. Following up with participations and/or other providers as needed to ensure alignment of efforts and reduce duplication
3. Working collaboratively with partners to ensure warm-hand off's, service coordination, and effective communication.
4. Identification of program and system challenges impacting priority households

## RECORDS, FORMS AND RECORD KEEPING

### Household Files:

Provider shall generate and maintain retrievable program records, including records relating to each HCMS household that receives services.

All records must be stored in HMIS under the Head of Household profile. Agencies MAY also store these records as hard files. If hard files are utilized provider shall ensure appropriate safeguards are always implemented to secure households' Protected Health Information in compliance with HIPAA regulations.

Some records should not be uploaded into HMIS (as indicated below), and should be stored by the agency in a hard file; provider shall ensure appropriate safeguards are always implemented to secure households' Protected Health Information in compliance with HIPAA regulations.

These records shall include, but not be limited to, the following:

Document	REQUIRED in HMIS
Acknowledgement of Receipt of Privacy Script	X
Grievance Policy and Procedures with signed acknowledgment by household and any submitted grievances.	Upload
Phased Assessments	X
Eligibility documents: a. Identification b. Disability c. Income d. Homeless verification	Upload
Case Management Plans	Upload
Active Lease	Upload
Case Closure Documentation (e.g. final case note and reason for case closure/"exit").	X
Any other household documentation as required at Washington County's discretion	X
Service Transactions (Case Notes)	X
Agency ROIs	X

Provider shall utilize the DHS Special Request form for the following purposes:

- Requests to spend money not outlined in the HCMS Eligible Expenses Guide.
- Approval to Transfer a Participant.
- Approval to enroll an ineligible participant.

## PERFORMANCE TARGETS

Housing Case Management Services (HCMS)			
Performance Metric	Description	Target Goal	Rationale
Community Connect Referrals Timeline	Average Days to either enroll or make a documented contact attempt for Community Connect Referrals	3 business days	Supports Coordinated Entry efficiencies
Households Exiting without housing	% of Households that exit to negative housing destinations prior to housing	<20%	Supports housing goals
Days to House	Average Days to Housing Move-In from Program Enrollment	100 Days	Supports Work Plan goal: Reduce average stay in shelter programs to less than 100 days, increase exits to housing to 75%
Housing Retention	Annual Housing Retention, measured as: All HHs Housed at reporting period end or Exited to Positive Destinations (who do not return to homelessness in the period) / All Households Housed at least one point in the reporting period	95%	Supports HUD reporting outcomes
Average Contracted Utilization %	Average amount of the household capacity that a housing program has been contracted for that has been utilized (as measured by Households Enrolled / Contracted Household Capacity)  This will not be measured until 180 days after new contracted capacity has been added.	90%	Supports utilization goals



## 2023-2024 Washington County Supportive Housing Services Quality Assurance Program Attachment A-4.7 Scope of Work

### SCOPE OF WORK (SOW)

This Scope of Work is the contractual requirements to which the Quality Assurance Program providers must adhere. This document is not a standalone document and works in conjunction with the Work Order and Program Standards. Washington County Supportive Housing Services Department maintains the right to make changes related to the functions of this work dependent on changes to the Homelessness Management Information System (HMIS) and Washington County agency monitoring procedures. Programs will be notified through policies, interim guidance, and other forms of communication when deemed necessary. Programs must be in compliance with all local, state and federal laws constituted to protect against discrimination and harassment and relative to privacy, confidentiality, and financial management of grant funds.

### PROGRAM OVERVIEW

The Quality Assurance Program (QAP) is designed to ensure that homeless service providers who are contracted with Washington County to provide services to people experiencing homelessness or at risk of homelessness will be able to produce high quality, accurate, data through the Homeless Management Information System (HMIS). In addition, the work will also address quality assurance and fidelity to the funded programs' practices to ensure that they are in line with best practices and funder requirements. Through this program, any provider who has at least two programs with Washington County, will receive funding to support one Data and Quality Assurance Specialist who will be responsible for data quality and program fidelity assurance activities. The Data and Quality Assurance Specialist will work closely with the Washington County HMIS team to advise on agency needs, assist with designing reports, and identifying and providing training and guidance for agency staff members. The Data and Quality Assurance Specialist will not take over data entry responsibilities for case managers and instead offer support in the data entry process where needed. Additionally, the Data and Quality Assurance Specialist will work with the County Monitoring team to assist with compliance monitoring reviews.

The Data and Quality Assurance Specialist will be responsible for the following activities:

- Responsible for monitoring, analyzing, and reporting of data from HMIS
- Work to continuously improve the quality of programs and services through the development, execution, and evaluation of data collection and reporting systems including client file management
- Review client records both in HMIS and hard files (if appropriate), proactively leading appropriate reviews and any needed improvement in policies and procedures to ensure quality across all Washington County-funded homeless programs
- Responsible for ongoing, in-depth review and evaluation of agency homeless program data collection practices and quality
- Prepare regular (canned and custom) and ad-hoc reports, analyses, analysis of agency and client data, presentations, charts, graphs, and other documents as assigned
- Develop and generate reports/queries to monitor data quality according to the Washington County Data Quality Plan
- Provide support & technical assistance for agency staff
- Monitor the progress of agency staff in taking required HMIS training as outlined by Washington County
- Participate in HMIS related meetings, webinars, demonstrations and other presentations, as required

- Research, interpret and prepare datasets, as requested
- Review financial assistance requests to ensure compliance with appropriate documentation standards
- Monitor agency compliance with contractual standards and assist in regular monitoring activities as directed by the County

Funded providers will be responsible for hiring and supervision of the Quality Assurance Specialist. Providers must also agree that they will be open to and consider guidance provided by the Washington County HMIS team about the relative success of the person employed in this position and any concerns that may arise.

## PERFORMANCE TARGETS

No.	Performance Target Details	Target Goal
1.	<ul style="list-style-type: none"> <li>• % of Data Quality Reports submitted on time and accurately as required in the Data Quality Plan</li> </ul>	90%
2.	<ul style="list-style-type: none"> <li>• % of required County HMIS meetings attended</li> </ul>	95%
4.	<ul style="list-style-type: none"> <li>• % of agency staff who complete all assigned HMIS training in PowerDMS within 2 weeks of gaining PowerDMS access</li> </ul>	80%



## 2023-2024 Washington County Supportive Housing Services Housing Careers Training Services Program Attachment A-4.12 Scope of Work

### SCOPE OF WORK (SOW)

This Scope of Work is the contractual requirements to which the Training Services (TS) providers must adhere. This document is not a standalone document and works in conjunction with the Work Order and Program Standards. Washington County Supportive Housing Services Department maintains the right to make changes related to prioritization, collaboration, and other aspects of the implementation of the complete system. Contractors will be notified through policies, interim guidance, and other forms of communication when deemed necessary. Contractors must be in compliance with all local, state and federal laws constituted to protect against discrimination and harassment and relative to privacy, confidentiality, and financial management of grant funds.

### PROGRAM OVERVIEW

The Homeless Services Division (HSD) will need to continue to hire a diverse, competent workforce via its partner agencies to implement homeless services programming. The Housing Careers Program (HCP) seeks to address these needs. The program will recruit and train participants with lived experience of homelessness who have moved through the housing services system. A particular emphasis will be placed on recruiting individuals who identify as LGBTQ+, Black, Indigenous, Latino/a/e, Asians, Pacific Islanders, immigrants, and refugees.

The HCP will continue its second demonstration year in Washington County by identifying and referring no less than 45 individuals with lived experience of homelessness and interest in employment within the homeless services field. The program will support no less than three cohorts of 15 participants in its second year. The program participants will participate in a short-term training series that provides education on peer support core competencies, job skills related to the homeless services field, and basic employment skills.

Upon completing the short-term training, participants will be placed in an up to 500-hour paid internship with a community-based organization that is part of the homeless services continuum in Washington County. Participants will develop skills throughout their internship to serve as shelter support workers, housing navigators, case managers, resident support staff, or other housing-related positions. Participants will receive supported employment services throughout their training and internship. Supported employment services will include employment goal planning, skills assessment and development, employment coaching, and employment navigation services.

Contractors providing training services, internship placement services and supported employment services must work collaboratively for the duration of the program to ensure interns are sufficiently supported and developing necessary skills to contribute to the work of community-based organizations providing homeless services. Upon successful internship completion, participants may be offered permanent employment with community-based organizations in positions funded by the HSD.

### PHILOSOPHY

Contractor shall administer services while adhering to the following key philosophies:

- Provide services in a culturally responsive manner while centering the lived experience of those who

identify as LGBTQ+, Black, Indigenous, Latino/a/e, Asians, Pacific Islanders, immigrants, and/or refugees.

- Utilize a person-centered approach that includes excellent customer service sensitive to the challenges that persons experiencing or with lived experience of homelessness face.
- Adhere to a standard of care that incorporates principles of Trauma Informed Care, Harm Reduction techniques, and Housing First best practices when providing services.
- Ensure that all services are tailored to individual needs, when possible. Intensity of services should be regularly monitored and adjusted as needed following principles of a modified Critical Time Intervention and Progressive Assistance model techniques.

## SCOPE OF WORK SUMMARY

Contractor will work collaboratively with the supported employment services contractor and internship placement contractor to administer services for the Housing Careers Program. The following table defines the scope of services for each contractor:

Service	Contractor		
	Training Services	Supported Employment Services	Internship Placement Services
Identify placement sites and positions for interns	<i>Out of scope</i>	<i>Out of scope</i>	X
Receive and process participant referrals	<i>Out of scope</i>	X	<i>Out of scope</i>
Screen participant referrals and make selections	<i>Out of scope</i>	X	X
Provide pre-training support to participants (i.e., purchasing training materials, ensuring participant readiness prior to start of training)	X	X	<i>Out of scope</i>
Develop training curriculum, manage training logistics, and administer training courses	X	<i>Out of scope</i>	<i>Out of scope</i>
Provide intern support to ensure placement readiness and offer ongoing supportive services to interns throughout placement	<i>Out of scope</i>	X	<i>Out of scope</i>
Provide placement agency support and manage placement logistics. Administer and manage intern paychecks and benefits.	<i>Out of scope</i>	<i>Out of scope</i>	X
Develop individualized service plans to address employment needs of interns	X	X	<i>Out of scope</i>
Prepare interns for permanent employment and program exit	<i>Out of scope</i>	X	<i>Out of scope</i>
Manage coordination between contractors and	<i>Out of scope</i>	<i>Out of scope</i>	X

placement agencies	<i>scope</i>		
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## SERVICE DELIVERY SCOPE

The role and responsibilities of the TS contractor are described below:

### Training

The TS contractor shall develop, coordinate, and implement a training course with up to 50 hours (but no less than 40 hours) of training curriculum to be offered for interns prior to the start of their internship. The training course will be offered no less than three times throughout the initial demonstration year of the program to no less than 45 interns. The training series should strive to be flexible in nature with training days and times taking into account various intern schedules and availabilities. Training sessions should be offered in-person while keeping in mind accessibility of training location.

The Training Services contractor shall include, but is not limited to, the following curriculum:

- Housing services curriculum should incorporate elements of understanding Oregon Fair Housing Law, navigating housing resources in Washington County, addressing barriers to housing stability, and best practices for documenting client interactions and services.
- Basic employment skills curriculum should incorporate topics such as navigating workplace disagreements, problem-solving, teamwork, organization, and reliability.
- Peer support core competency curriculum should be approved through Mental Health and Addiction Certification Board of Oregon (MHACBO) as peer support-eligible training.
  - Training curriculum will include significant elements of the Peer Support Specialist certification training. However, this training is not intended to replace the certification training.
  - Interns may choose to pursue additional training opportunities to become certified Peer Support Specialists outside of the training provided as part of the Housing Careers Program.

The TS contractor shall develop, coordinate, and implement ongoing training sessions for interns to be offered throughout the internship placements. Training sessions shall consist of up to ten additional hours of training curriculum for interns. The TS contractor will consider feedback from internship placement agencies, the supported employment services contractor, and the internship placement contractor when developing ongoing training curriculum to best address the skill development needs of interns.

### Collaboration

TS contractor must work collaboratively with the supported employment services contractor to facilitate seamless training referrals for participants and establish communication channels to best support intern success. TS contractor shall manage regular communication with interns and service providers to establish training schedule, logistics, and expectations. TS contractor will ensure communication to interns considers accessibility, language capacity, and preferred communication channels.

TS contractor will meet bi-weekly with the supported employment service contractor and the internship placement services contractor to determine areas of improvement and adjust service delivery as needed. TS contractor shall participate in case conferencing meetings with supported employment services contractor and internship placement contractor when interns have exception needs for training and employment services support. Case conferencing may include the following activities:

- Discussion of intern's training and service needs and availability of potential resources to assist in



achieving desired employment and skill development goals.

- Determine service provider capacity to assist the participant with achieving employment and skill development goals and develop a plan for who will be responsible for which actions with or for the participant, including whether the TS contractor should work directly with the participant.

At the discretion of the DHS Contract Manager, provision of additional services and/or activities may be required.

### Finance

TS contractor must have policies and procedures that manage the monitoring and coordination of the use and disbursement of funds. Contractor must document the process for ensuring that all payments are timely and that payments are paid to appropriate parties. Contractor will not provide financial assistance directly to any program participant, rather they will issue payment for training support materials to vendors directly.

Eligible miscellaneous training expenses include materials needed strictly for the delivery of training curriculum. The following table defined eligible and ineligible expenses:

Eligible Expenses	Ineligible Expenses
Compensation for subcontracting with trainers	Transportation assistance (i.e., bus passes, gas cards)
Office supplies to be utilized during training courses (i.e., binders, printed materials, pens, fidget toys, jump drives)	Laptops, phones, or professional attire to be used for internships.
Refreshments to be offered during training courses	Gift cards, meal tickets or other food items not to be consumed during training hours
Reservation fees for space to host trainings and virtual video account fees to host virtual trainings	Ongoing rent or leasing fees for office space
	Fees for external training opportunities for participants
<i>Additional expenses not listed here may be approved at the discretion of the DHS Contract Manager. Requests for additional expense approvals must be submitted in writing.</i>	

### Record Keeping and Enrollment

TS contractor will process and accept referrals from supported employment services contractor. Contractor must make contact with referred participants three (3) business days prior to the start of the training program. TS contractor should make every effort to connect with participant and ensure they have all necessary training information and materials prior to the start of the program. If TS contractor is unable to connect with a participant, staff should coordinate with supported employment services contractor to develop a strategy to connect with participant.

TS contractor is responsible for enrolling participants into training services through the Homeless Management Information System (HMIS) system. Program staff will need to ensure the training assessment is completed and case notes are documented that reflect the progress and completion of training services

for program participants.

The TS contractor shall generate and maintain retrievable program records. Records do not need to be hard files and can be digitally uploaded into HMIS. If hard files are utilized, the contractor shall ensure appropriate safeguards are implemented to ensure confidentiality of participants' personal information. These records shall include, but not be limited to, the following:

- Release of Information form for HMIS (ROI) **(required)**
- Grievance Policy and Procedures with signed acknowledgment by participant and any submitted grievances
- Training Assessment **(required)**
- Training Support Plans and record of training attendance **(can be in notes section of HMIS)**
- Incident Reports
- Documentation of training completion and program exit **(required)**

Release of information, Grievance Policy, and Incident Report may be generated and maintained by supported employment services contractor. TS contractor must verify that all required records are appropriately documented in HMIS. TS contractor shall maintain curriculum materials that include a thorough outline of training content for peer support core competencies, housing services knowledge, and basic employment skills curriculum.

## PERFORMANCE TARGETS

Training Services Workforce Development Program		
No.	Performance Target Details	Target Goal
1.	<ul style="list-style-type: none"> <li>• % of supported employment services referrals where contact is established 3 days prior to beginning of training session</li> </ul>	90%
2.	<ul style="list-style-type: none"> <li>• % of enrolled interns with at least four (4) training services notes per internship entered into HMIS documenting establishment and progress made on Training Support Plan</li> </ul>	70%
3.	<ul style="list-style-type: none"> <li>• % of enrolled interns that complete all training requirements and modules</li> </ul>	80%
4.	<ul style="list-style-type: none"> <li>• No less than 2 case conferencing or program services coordination sessions conducted each month</li> </ul>	80%



# WASHINGTON COUNTY OREGON

## ATTACHMENT C INSURANCE REQUIREMENTS SUMMARY FORM

Contractor shall provide insurance coverage and limits as described below. All insurance carried by Contractor must be primary to and non-contributory with any insurance, including any self-insurance carried by the County. A waiver of subrogation in favor of the County shall be required on General Liability, Worker's Compensation and Automobile Liability coverage.

**It is strongly advised that contractors give this information to their insurance agent to verify that all requirements can be met.**

1. **COMMERCIAL GENERAL LIABILITY INSURANCE.** Contractor shall at all times carry a Commercial General Liability insurance policy for Bodily Injury, Property Damage, and Personal Injury. This insurance shall include contractual liability coverage for the indemnity provided under this contract. The policy shall name Washington County, its agents, officers, elected officials and employees, as an **ADDITIONAL INSURED by separate endorsement**.
  - Not Required.
  - COMMERCIAL GENERAL LIABILITY INSURANCE with limits of not less than:
    - \$500,000 / \$1,000,000
    - \$1,000,000/\$2,000,000
    - \$2,000,000 / \$4,000,000
    - Other: \$ \_\_\_\_\_ each occurrence / aggregate for Bodily Injury and Property Damage.
    - ADDITIONAL INSURED ENDORSEMENT not required.
  
2. **AUTOMOBILE LIABILITY INSURANCE.** Contractor shall at all times carry Automobile Liability Insurance for Bodily Injury and Property Damage for Contractor's vehicles, whether owned, hired, or non-owned, which includes coverage for Washington County, its agents, officers, elected officials and employees.
  - Not required.
  - AUTOMOBILE LIABILITY INSURANCE with a combined single limit per accident, or the equivalent of not less than:
    - \$1,000,000
    - \$2,000,000
    - Other: \$ \_\_\_\_\_ each accident for Bodily Injury and Property Damage for Contractor's vehicles whether owned, hired, or non-owned.
    - No requirement in excess of that required under state law.
    - Automobile Liability Additional Insured Endorsement is not required.
  
3. **PROFESSIONAL LIABILITY INSURANCE** Contractor shall at all times carry a Professional Liability/Errors and Omissions type insurance policy.
  - Not required.
  - PROFESSIONAL LIABILITY INSURANCE with limits of not less than:
    - \$1,000,000/\$2,000,000
    - \$1,000,000/\$3,000,000
    - \$2,000,000/\$4,000,000
    - Other: \$ \_\_\_\_\_ each occurrence (or each claim if coverage is afforded on a claims made basis)/aggregate to cover damages caused by error, omission or negligent acts related to the professional services to be provided under this contract.

4.  **WORKERS' COMPENSATION INSURANCE.** Contractor shall comply with ORS 656.017, which requires subject employers to provide Oregon workers' compensation coverage for all their subject workers. No Workers' Compensation Insurance has been or will be obtained by the County for Contractor or Contractor's employees and subcontractors. Contractor shall provide and maintain workers' compensation coverage for its employees, officers, agents or partners as required by applicable workers' compensation laws including employers' liability with limits not less than \$500,000/ \$500,000/ \$500,000.

OTHER: \$ \_\_\_\_\_

5. **OTHER COVERAGE(S) REQUIRED**

- A.  **POLLUTION OR ASBESTOS LIABILITY INSURANCE** with limits of not less than

\$1,000,000

Other: \$ \_\_\_\_\_ each occurrence (or each claim if coverage is afforded on a claims made basis)

**AND**

\$1,000,000

Other: \$ \_\_\_\_\_ in the annual aggregate to cover damages due to Bodily Injury, Property Damage and Environmental Damage resulting from "sudden accidental" or "gradual" pollution and related cleanup costs.

- B.  **EMPLOYEE DISHONESTY AND MONEY AND SECURITIES** with a limit of not less than

\$ \_\_\_\_\_ each occurrence to cover Theft, Disappearance and Destruction of cash or negotiable securities in the care, custody or control of the contractor for County or on behalf of County clients.

- C.  **CYBER LIABILITY INSURANCE** with limits of not less than

\$1,000,000

Other: \$ \_\_\_\_\_ each occurrence to cover data losses caused by cyber attacks, viruses, other threats, paper transactions, crisis services and lawsuits that result from data breaches or your failure to protect sensitive information.

- D.  **PHYSICAL ABUSE AND MOLESTATION INSURANCE** with limits of not less than

\$1,000,000

Other \$ \_\_\_\_\_ each occurrence to cover actual or threatened physical abuse, mental injury, sexual molestation, or negligent employment, supervision, investigation, reporting to proper authorities or retention of any person for whom the Contractor is responsible for, including but not limited to Contractor and Contractor's employees and volunteers. Coverage can be provided by a separate policy or as an endorsement to the general or professional liability policies.

- E.  **PRODUCTS COMPLETED OPERATIONS HAZARD ADDITIONAL INSURED ENDORSEMENT** naming Washington County, its agents, officers, elected officials and employees with respect to liability for Bodily Injury and Property Damage.

- F.  **BUILDER'S RISK** \$ \_\_\_\_\_ Contractor to provide the additional coverage types and limits required on large construction projects, as outlined by the Risk Manager. The coverage requirements remain in place through the duration of the construction project. If the Builder's Risk policy renews annually during the construction project, any significant changes require County Risk

Manager approval prior to implementation. The County is to receive copy of new policy with the approved changes and will attach to the original contract terms. Contractor with proof of payment and cost for coverage may be reimbursed at cost with no mark-up for the Builder's Risk coverage.

G.  **OTHER** (describe coverage and limits):

**NOTES:**

**Extended Reporting Coverage ("Tail Coverage").** For Professional Liability/Errors & Omissions Insurance written on a "claims made" basis and for any other required liability insurance provided on a "claims made" basis, Contractor shall provide "tail" coverage at the completion of the contract for a duration of thirty-six (36) months or continuous "claims made" liability coverage for thirty-six (36) months following contract completion. Continuous "claims made" coverage will be acceptable in lieu of "tail" coverage provided the retroactive date of the coverage is on or before the effective date of the contract.

**Maximum Deductible/Retention.** Any deductible or retention must be disclosed on the certificate of insurance and no deductible or retention may exceed \$25,000 without the prior written consent of the County. Contractor is responsible to pay any amounts within the deductible or retention amount.

**Additional Insureds.** The County, its agents, officers, elected officials and employees must be named as additional insureds with respect to Contractor's services to be provided under this Contract. All liability insurance policies, with the exception of professional and/or workers compensation policies, must be endorsed to show this additional coverage.

**Insurance Certificates.** Contractor shall deliver to the County, prior to the commencement of work, a certificate of insurance evidencing all policies required by this contract including additional insured provisions afforded by the policy. This requirement can be satisfied by providing a copy of the coverage form and/or the endorsement(s). Further, it is an affirmative obligation upon the Contractor to advise the Contract Administrator within two business days of any substantive change of any insurance policy or endorsement set out herein, and failure to do so shall be construed to be a breach of this contract.

**Subcontractor Insurance.** Contractor shall require and verify that all of its subcontractors of any tier provide insurance coverage and limits identical to the insurance required of the Contractor under this contract, unless the requirement is expressly modified or waived by the County.

For Administrative Use Only – Z99999

Supplier Name: Open Door Counseling Center

Actual Contract Number (CustomText4): 23-1235

Department (Location): Housing

Contract Type: 2 P/P Services

Contract Sub Type (Custom2Code): P/P Services

Minute Order Date: 1/18/2022

Minute Order Number: 22-13

Master Contract Number (CustomText1): 23-1235

Bid/RFP # (BidRFP): 2021.051PQ & 2023.005-RFP

BPO Number (Custom1Code): Expense Contract

SHIP TO (LocShipTo): Housing

BILL TO (LocBillTo): Housing

Project Number (CustomText2):

Chargeable Program Number (ChargeProgram): 221SHSFY23-24

Contract Admin (Administrator): Katherine Galian

**Certificate Of Completion**

Envelope Id: 78018F0E68A143299256D2A611DE97A9	Status: Completed
Subject: Complete with DocuSign: 23-1235: Open Door Counseling Center	
Source Envelope:	
Document Pages: 94	Signatures: 2
Certificate Pages: 5	Initials: 0
AutoNav: Enabled	Envelope Originator:
Envelope Stamping: Enabled	Connie Wilson
Time Zone: (UTC-08:00) Pacific Time (US & Canada)	155 N. First Ave, Suite 270
	MS28
	Hillsboro, OR 97124-3087
	Connie_Wilson@co.washington.or.us
	IP Address: 204.147.152.14

**Record Tracking**

Status: Original	Holder: Connie Wilson	Location: DocuSign
8/10/2023 1:32:12 PM	Connie_Wilson@co.washington.or.us	
Security Appliance Status: Connected	Pool: StateLocal	
Storage Appliance Status: Connected	Pool: Washington County	Location: DocuSign

**Signer Events**

Jeremy A. Toevs  
 jtoevs@odhw.org  
 Executive Director  
 Security Level: Email, Account Authentication (None), Access Code

**Signature**

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 Signature Adoption: Pre-selected Style  
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 Viewed: 8/10/2023 1:38:09 PM  
 Signed: 8/10/2023 2:24:23 PM

**Electronic Record and Signature Disclosure:**

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 ID: e7f3d649-2ac3-48b7-a5e5-1171fc10572a

Marni Kuyl  
 Marni\_Kuyl@washingtoncountyor.gov  
 Marni Kuyl ACA ACA  
 Security Level: Email, Account Authentication (None), Access Code

DocuSigned by:  
  
 802F57129067492...  
 Signature Adoption: Pre-selected Style  
 Using IP Address: 204.147.152.15

Sent: 8/10/2023 2:24:27 PM  
 Viewed: 8/10/2023 3:39:15 PM  
 Signed: 8/10/2023 3:39:28 PM

**Electronic Record and Signature Disclosure:**

Accepted: 8/10/2023 3:39:15 PM  
 ID: 720c3296-8650-48b8-8856-0c4a93b1839c

In Person Signer Events	Signature	Timestamp
Editor Delivery Events	Status	Timestamp
Agent Delivery Events	Status	Timestamp
Intermediary Delivery Events	Status	Timestamp
Certified Delivery Events	Status	Timestamp
Carbon Copy Events	Status	Timestamp
Witness Events	Signature	Timestamp
Notary Events	Signature	Timestamp

<b>Envelope Summary Events</b>	<b>Status</b>	<b>Timestamps</b>
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Certified Delivered	Security Checked	8/10/2023 3:39:15 PM
Signing Complete	Security Checked	8/10/2023 3:39:28 PM
Completed	Security Checked	8/10/2023 3:39:28 PM

<b>Payment Events</b>	<b>Status</b>	<b>Timestamps</b>
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**Electronic Record and Signature Disclosure**



## **ELECTRONIC RECORD AND SIGNATURE DISCLOSURE**

From time to time, Carahsoft OBO SHI OBO Washington County (we, us or Company) may be required by law to provide to you certain written notices or disclosures. Described below are the terms and conditions for providing to you such notices and disclosures electronically through the DocuSign system. Please read the information below carefully and thoroughly, and if you can access this information electronically to your satisfaction and agree to this Electronic Record and Signature Disclosure (ERSD), please confirm your agreement by selecting the check-box next to 'I agree to use electronic records and signatures' before clicking 'CONTINUE' within the DocuSign system.

### **Getting paper copies**

At any time, you may request from us a paper copy of any record provided or made available electronically to you by us. You will have the ability to download and print documents we send to you through the DocuSign system during and immediately after the signing session and, if you elect to create a DocuSign account, you may access the documents for a limited period of time (usually 30 days) after such documents are first sent to you. After such time, if you wish for us to send you paper copies of any such documents from our office to you, you will be charged a \$0.00 per-page fee. You may request delivery of such paper copies from us by following the procedure described below.

### **Withdrawing your consent**

If you decide to receive notices and disclosures from us electronically, you may at any time change your mind and tell us that thereafter you want to receive required notices and disclosures only in paper format. How you must inform us of your decision to receive future notices and disclosure in paper format and withdraw your consent to receive notices and disclosures electronically is described below.

### **Consequences of changing your mind**

If you elect to receive required notices and disclosures only in paper format, it will slow the speed at which we can complete certain steps in transactions with you and delivering services to you because we will need first to send the required notices or disclosures to you in paper format, and then wait until we receive back from you your acknowledgment of your receipt of such paper notices or disclosures. Further, you will no longer be able to use the DocuSign system to receive required notices and consents electronically from us or to sign electronically documents from us.

### **All notices and disclosures will be sent to you electronically**

Unless you tell us otherwise in accordance with the procedures described herein, we will provide electronically to you through the DocuSign system all required notices, disclosures, authorizations, acknowledgements, and other documents that are required to be provided or made available to you during the course of our relationship with you. To reduce the chance of you inadvertently not receiving any notice or disclosure, we prefer to provide all of the required notices and disclosures to you by the same method and to the same address that you have given us. Thus, you can receive all the disclosures and notices electronically or in paper format through the paper mail delivery system. If you do not agree with this process, please let us know as described below. Please also see the paragraph immediately above that describes the consequences of your electing not to receive delivery of the notices and disclosures electronically from us.

**How to contact Carahsoft OBO SHI OBO Washington County:**

You may contact us to let us know of your changes as to how we may contact you electronically, to request paper copies of certain information from us, and to withdraw your prior consent to receive notices and disclosures electronically as follows:

To contact us by email send messages to: [tina\\_hartmeier@co.washington.or.us](mailto:tina_hartmeier@co.washington.or.us)

**To advise Carahsoft OBO SHI OBO Washington County of your new email address**

To let us know of a change in your email address where we should send notices and disclosures electronically to you, you must send an email message to us at [tina\\_hartmeier@co.washington.or.us](mailto:tina_hartmeier@co.washington.or.us) and in the body of such request you must state: your previous email address, your new email address. We do not require any other information from you to change your email address.

If you created a DocuSign account, you may update it with your new email address through your account preferences.

**To request paper copies from Carahsoft OBO SHI OBO Washington County**

To request delivery from us of paper copies of the notices and disclosures previously provided by us to you electronically, you must send us an email to [tina\\_hartmeier@co.washington.or.us](mailto:tina_hartmeier@co.washington.or.us) and in the body of such request you must state your email address, full name, mailing address, and telephone number. We will bill you for any fees at that time, if any.

**To withdraw your consent with Carahsoft OBO SHI OBO Washington County**

To inform us that you no longer wish to receive future notices and disclosures in electronic format you may:

- i. decline to sign a document from within your signing session, and on the subsequent page, select the check-box indicating you wish to withdraw your consent, or you may;
- ii. send us an email to [tina\\_hartmeier@co.washington.or.us](mailto:tina_hartmeier@co.washington.or.us) and in the body of such request you must state your email, full name, mailing address, and telephone number. We do not need any other information from you to withdraw consent.. The consequences of your withdrawing consent for online documents will be that transactions may take a longer time to process..

### **Required hardware and software**

The minimum system requirements for using the DocuSign system may change over time. The current system requirements are found here: <https://support.docusign.com/guides/signer-guide-signing-system-requirements>.

### **Acknowledging your access and consent to receive and sign documents electronically**

To confirm to us that you can access this information electronically, which will be similar to other electronic notices and disclosures that we will provide to you, please confirm that you have read this ERSD, and (i) that you are able to print on paper or electronically save this ERSD for your future reference and access; or (ii) that you are able to email this ERSD to an email address where you will be able to print on paper or save it for your future reference and access. Further, if you consent to receiving notices and disclosures exclusively in electronic format as described herein, then select the check-box next to ‘I agree to use electronic records and signatures’ before clicking ‘CONTINUE’ within the DocuSign system.

By selecting the check-box next to ‘I agree to use electronic records and signatures’, you confirm that:

- You can access and read this Electronic Record and Signature Disclosure; and
- You can print on paper this Electronic Record and Signature Disclosure, or save or send this Electronic Record and Disclosure to a location where you can print it, for future reference and access; and
- Until or unless you notify Carahsoft OBO SHI OBO Washington County as described above, you consent to receive exclusively through electronic means all notices, disclosures, authorizations, acknowledgements, and other documents that are required to be provided or made available to you by Carahsoft OBO SHI OBO Washington County during the course of your relationship with Carahsoft OBO SHI OBO Washington County.