



Beginning Volume

# 418      Ord. # 149829

## CONTRACT FOR SERVICES

## SECTION I: PARTIES TO THE CONTRACT

CITY OF PORTLAND ("City"), City Hall, 1220 S. W. Fifth Avenue,  
Portland, Oregon 97204, and

METROPOLITAN FAMILY SERVICES, INC., 2281 N. W. Everett, Portland,  
Oregon 97210, Contractor.

## SECTION II: CONTRACT SUMMARY

Contractor agrees to provide in-home support services, including homemaker, housekeeper, and case management III services for elderly residents in Portland/Multnomah County, and further agrees that the total cost shall not exceed the sum of \$406,065.

## SECTION III: PERIOD OF PERFORMANCE

Performance under this contract shall commence July 1, 1980, and continue through June 30, 1982, unless extended by City Council action. Activities and budget shall be negotiated annually.

## SECTION IV: AGREED CONTRACTOR: PROJECT OPERATION

- A. Contractor shall by June 30, 1981, meet all goals and objectives stated in the "Project Narrative" (Exhibit A, hereby incorporated by reference).
- B. Contractor shall ensure that no portion of this contract shall in any way discriminate against, deny benefits to, deny employment to, or exclude from participation any persons on the grounds of race, color, national origin, religion, age, sex, handicap, marital status, sexual preference, political affiliation or belief; and that it shall target these services to those most in need.
- C. Contractor shall provide a minimum 5% match (\$21,371) as approved in the budget (refer to Exhibit B). Failure to meet this requirement shall result in a reduction of budget or termination of contract.
- D. Contractor shall retain client records for a minimum of five years and shall make said documents available at all reasonable times to the City, or its duly authorized representative, for evaluation through inspection of the quality, appropriateness, and timeliness of services.
- E. The use or disclosure by any party of any information concerning a recipient of services purchased under this contract, for any purpose not directly connected with the administration or program evaluation of the City, is prohibited except on written consent of the recipient or the recipient's attorney.

SECTION V: CONTRACTOR REPORTING AND RECORD REQUIREMENTS

- A. Contractor shall use the standardized forms provided by the City for reporting purposes (Exhibit C, hereby incorporated by reference). If additional forms are deemed necessary, said forms shall be developed through negotiation.
- B. Required program reports shall be submitted by 3:00 P.M. of the 5th working day of each month. Reports shall be completed accurately in conformance with the guidelines and monitoring directions provided by the City. Program reports which are not received by the time specified shall result in delayed reimbursement.
- C. Contractor shall submit to the City, a final "Director's Narrative Report" within forty-five (45) days of the conclusion of the Project covered by this contract. The report should identify problems, corrective action taken, requests for technical assistance, any plans for seeking/securing other resources, and any concerns relative to the City's performance.
- D. Contractor shall maintain for a minimum of three (3) years all fiscal and program reports, including statistical records, and shall provide these reports at times and in the form prescribed by the City. In the event of dissolution of the corporation within the specified time, said records shall be turned over to the City Auditor.
- E. Contractor shall submit to the City copies of all requests for Federal, state or local grants that affect the services provided under this contract prior to submitting the request to the funding source.
- F. Contractor shall provide for program and facility reviews, including meetings with consumers, reviews of service and fiscal records, policies/procedures, staffing patterns, job descriptions, and meeting with any staff directly or indirectly involved in the performance of this contract at any reasonable time on request of and by persons authorized by the City.
- G. Contractor shall submit to the City one (1) copy of all formal documents produced under this contract.
- H. Contractor shall provide proof of its timely payment of withholding taxes, unemployment taxes, and SAIF.
- I. Contractor shall submit to the City, prior to commencement of this contract except where one is already on file, its current:
  - Personnel Policy which sets forth procedures for hiring, firing, grievances; and identifies all paid holidays;

- List of names and signatures of persons authorized to act as the Contractor's agents;
- Articles of Incorporation and By-Laws;
- List of Board of Directors and Advisory Council members.

Contractor further agrees to submit any changes in these documents to the City within thirty (30) days of their effective dates.

SECTION VI: AGREED CITY

- A. City shall provide technical assistance upon written request of the Contractor.
- B. City shall provide all required reporting forms to the Contractor.
- C. City shall monitor the project based on all of the provisions as set forth in this contract.
- D. City shall give Contractor written notification of problem areas related to the performance of this contract, including requirements for corrective action.
- E. City may conduct at least one contractor meeting per month.
- F. City shall conduct training sessions as necessary to ensure quality delivery services and effective program management.
- G. City shall conduct on-site contract and facility reviews on a quarterly basis. On-site monitoring shall be pre-arranged with each Contractor.
- H. City shall process monthly reimbursement requests and contract amendments in a timely manner.

SECTION VII: COMPENSATION - METHOD OF PAYMENT

- A. Total compensation under this contract shall not exceed \$406,065.
- B. An advance shall be made to cover the cost of the Contractor's initial expenses for operation, not to exceed the sum of \$67,678 upon receipt of a written request from the Contractor.

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- C. The additional amounts due after the initial advance shall be reimbursed upon receipt of the required ACCOUNTING REPORT FORMS (refer to Exhibit C), the original with appropriate documentation attached. All reimbursement documents shall be received by the fifteenth (15th) working day of each month. Reimbursements not received by the specified time shall be delayed and processed for payment the following month, or may result in termination of the contract. Payments shall also be held if the required program reports are not received by the specified time.
  - D. All final reimbursement documents shall be received within forty-five (45) days following the end of the budget period. Final reimbursement documents not received within the specified time period shall not be processed, and the expense shall be the sole responsibility of the Contractor.
  - E. Advances shall be recovered against expenditures in accordance with an established schedule developed and distributed by the City.
  - F. All payments made pursuant to this contract are subject to post audit. The City shall perform spot audits at their discretion any time during the contract period. Contract costs disallowed by the City shall be the sole responsibility of the Contractor. If a contract cost is disallowed after reimbursement has occurred, the Contractor shall promptly repay the City.
  - G. All funds received from the City shall be used by the Contractor as set forth in the budget (refer to Exhibit B). Funds not used shall be returned promptly to the City at the end of the budget period. Any costs incurred by the Contractor over and above the agreed sums, as set out in the budget, shall be at the sole risk and expense of the Contractor.
  - H. The operating budget may be amended, provided the full cost does not exceed the amount stated in the contract. Budget amendments shall not become effective until the Commissioner-in-Charge has given written approval and filed the approved document with the City Auditor. Budget overruns of five percent (5%) or \$1,000, whichever is less, are allowable without a budget amendment on all line items within the Materials and Services category, excluding Out-of-Town Travel. These line item overruns shall be compensated for within the same category.
  - I. Budget amendments shall not be accepted during the last quarter of the budget period (April 1 through June 30).

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- J. All items with a purchase price of one hundred dollars (\$100) or more hereunder shall be purchased in the name of the City. Such purchases shall be for cash and not include any credit terms, and shall be reported to the City within ten (10) days (refer to Exhibit C), tagged by the City, included in the City's Property Control, and shall be the property of the City. Contractor shall maintain an acceptable and current log of this property and property acquired under previous contracts with the City. All non-expendable items shall be returned to the City within ten (10) days after the contract has terminated.
- K. Contractor shall also maintain a current and acceptable log of all non-consumable supplies purchased under this contract. Non-consumable means items with a minimum value of \$25.00 per item and a maximum value of \$99.99 per item purchased under this contract. All such items shall also be returned to the City within ten (10) days after the contract has terminated.

## SECTION VIII: GENERAL CONDITIONS

- A. Contractor shall abide by all Federal, state and local regulations/policies governing project operations, management, and service delivery. The funds shall be used for the purpose for which they are provided.
- B. Prior to commencement of this contract, Contractor shall deliver to the City Auditor evidence:
- (1) that all persons handling funds received or disbursed under this contract are covered by a Fidelity Bond in the amount of \$10,000 or 100% of the estimated sixty (60) day cash flow, whichever is less;
  - (2) of a Standard Liability Insurance Policy in the single limit amount of \$300,000 and provide the City Auditor with an endorsement thereto, naming the City as an additional insured and protecting the City, its agents, and employees from claims for damages arising in whole or in part out of the performance of this contract;
  - (3) that all property and equipment purchased or received by the Contractor pursuant to this contract is insured against fire, theft and destruction; and
  - (4) that the above policies of insurance are in force and shall not be cancelled without thirty (30) days prior notice to the City.

if approved as self-insured by the City Attorney, the Contractor shall deliver to the City Auditor, in lieu of a Standard Liability Insurance Policy, evidence that they agree to hold harmless, defend and indemnify the City, its agents and employees from any and all claims for damages arising in whole or in part out of the performance of this contract.

If the Contractor enters into more than one (1) contract with the City, insurance and bonding shall be furnished, together with the proper endorsements for each separate contract. Failure to maintain current insurance, bonding and proper endorsements for each separate contract shall result in the withholding of payment to the Contractor or the termination of the contract.

- C. The term "approval by the City" means written approval by the Executive Director and/or the Commissioner-in-Charge of the Human Resources Bureau. Unless otherwise specified, documents submitted to the City shall be regarded as received when delivered to the Human Resources Bureau.
- D. Compensatory time accrued by any employee performing services under this contract shall be taken within the budget period to be charged as a contract cost. Time not taken within this period shall become the sole risk and expense of the Contractor. This condition only applies if compensatory time is indicated in the Contractor's approved Personnel Policies and Procedures.
- E. Upon termination (cash out) of any employee performing services under this contract, a maximum of two weeks accrued vacation time shall be an allowable reimbursement cost. Time in excess of the two weeks maximum shall be the sole responsibility of the Contractor.
- F. It is expressly understood and agreed by both parties hereto that the City is contracting with the Contractor as an Independent Contractor and that the Contractor, as such, agrees to hold the City harmless and to indemnify it from and against any and all claims, demands, and causes of action of every kind and character which may be asserted by any third party arising out of, or in connection with, the services to be performed by the Contractor under this contract.

SECTION IX: SPECIAL CONDITIONS

- A. The staff supervisor, given reasonable notice, shall attend training sessions and meetings and participate in other activities as required by the City to a maximum of three sessions (24 hours) per month.
- B. Other staff hired under this contract shall participate in such training sessions, meetings and other activities as required by the City to a maximum of two sessions (16 hours) per month.
- C. The Contractor shall assure that older persons shall not be discriminated against and that older persons shall be employed on a part-time and full-time basis in carrying out programs, to the degree feasible and subject to the provisions of approved personnel policies.
- D. The Contractor shall conform to the client representative policy and the client confidentiality policy as set forth by the City.
- E. In performance hereof, the Contractor shall comply with the provisions of the "Non-Discrimination on Basis of Handicap" Section 504 of the Rehabilitation Act of 1973. (Refer to Exhibit "A," Attachment 8.)
- F. The Contractor agrees to submit documentation as required by the City to support waivers of contract policies and requirements granted by the City.
- G. The Contractor shall use the service definitions as set forth by the City and standardized reporting forms as developed and provided by the City.
- H. The Contractor shall employ City descriptions, policies, and procedures for the delivery, utilization, and coordination of information, referral, case management, escort, transportation, homemaker, housekeeper, legal, nutrition, and other contracted services provided as part of the Portland/Multnomah County Area Agency on Aging Service System.
- I. The Contractor shall complete the client tracking system forms for all clients accepted for case management services, which includes the client information form, to be submitted to the City by 3 p.m. on the 5th working day of each month.
- J. The Contractor shall conform to state, federal, and local laws and City policies and procedures governing service delivery and eligibility for service.



- K. Contractor agrees to comply with Oregon Project Independence Administrative Rules for services funded under Oregon Project Independence and to utilize the established fee schedule and other policies and procedures established by the City for implementation of Oregon Project Independence requirements.
- L. The Contractor shall serve eligible clients referred by designated Area Agency on Aging Agencies and shall not solicit clients outside the Area Agency on Aging service system. Prior approval must be obtained from the Area Agency on Aging to accept referrals from outside the Area Agency on Aging system of services.
- M. The Contractor shall enter into written agreements with other service providers with the Portland/Multnomah County Area Agency on Aging Service System as directed by the City to specify and clarify procedures of coordination.
- N. The Contractor shall give preference in the delivery of services to older persons with the greatest economic or social need in accordance with priorities and definitions provided by the City. The methods for giving preference may not include use of a means test.
- O. The Contractor shall revise procedures for referrals to and from district centers and special projects in consultation with the Area Agency on Aging by August 15, 1980.
- P. The Contractor shall, by August 15, develop procedures for ongoing coordination and communication with case managers concerning mutual clients.
- Q. The Contractor shall, in the event resources are not available to provide a service, document the situation, inform the person of the problem and place the person on a waiting list, prioritizing clients relative to those in greatest need of said services. Documentation shall be submitted quarterly to the City.
- R. The Contractor assures that federal funds under this contract are not used to replace funds from non-federal sources and agrees to continue or to initiate efforts to obtain support from private sources and other public organizations for services funded through this contract.
- S. The Contractor shall participate with the City in the ongoing development and implementation of a standardized information, referral, and case management system.

#### SECTION X: CONTRACT MODIFICATION

Contractor may request changes in the contract by submitting a written request in accordance with City procedures (refer to Exhibit C). Minor changes shall not become effective until the Commissioner-in-Charge has given written approval, and the approved document is filed with the City Auditor. Major changes shall not become effective until approved by City Council, signed by the appropriate parties, and the approved document filed with the City Auditor.

SECTION XI: CONTRACT ASSIGNMENT

- A. The Contractor has been selected by the City for this work because of its particular experience in this program area. This contract is personal between the parties, and the Contractor shall not assign or subcontract in whole or in part hereof without prior approval by the City.
- B. In the event the City decides to assign its interest in this contract, in whole or in part, the City shall give written notice of the assignment to the Contractor ten (10) days prior to the assignment.

SECTION XII: TERMINATION REMEDIES

- A. This contract may be terminated by either party at any time by giving a thirty (30) day advance notice by certified mail for failure or refusal of the other to perform faithfully the contract according to its terms.
- B. The contract may also be terminated at any time by the City by giving written notice if its federal, state, or local grants are suspended, modified, or terminated. In the event of termination, the Contractor shall be entitled to reimbursement for allowable costs incurred up to the date of termination indicated in the written notice.
- C. Nothing in this contract shall be construed to limit the City's legal contract remedies including, but not limited to, the right to sue for damages or specific performance should the Contractor materially violate any of the terms of this contract.

SECTION XIII: SIGNATURES

The parties witness their consent to be bound by all the terms of this contract, SECTIONS I through XII, by signing below.

APPROVED AS TO CONTENT

CONTRACTOR

By Erma E. H. Ploun 6-17-80 By \_\_\_\_\_  
 Executive Director Date

APPROVED AS TO FORM

CITY OF PORTLAND

By \_\_\_\_\_ By \_\_\_\_\_  
 City Attorney Date

By \_\_\_\_\_

## PROJECT APPLICATION SHEET

CITY OF PORTLAND HUMAN RESOURCES BUREAU		APPLICATION FOR PROJECT FUND	
1. Short Title of Project: (Do not exceed one typed line) IN-HOME SUPPORT SERVICES			
2. Type of Application (Check One) New Project <input checked="" type="checkbox"/> Continuing Project <input type="checkbox"/> Revision of Cont. Proj. <input type="checkbox"/>			
3. Responsible HRB Division Social Services - Aging		4. Contract Period From 7-1-80 to 6-30-82	
5. Budget Period From 7-1-80 to 6-30-81		6. City Support Requested \$ 406,065	
7. Applicant Agency (Name, address & telephone) METROPOLITAN FAMILY SERVICE 2281 N.W. Everett Portland, OR 97210 228-7238		8. Project Director (Name, address & telephone) Mary Ellen Hammons 2281 N.W. Everett Portland, OR 97210 228-7238	
9. Financial Officer (Name, address & telephone) Joe Martin 2281 N.W. Everett Portland, OR 97210 228-7238		10. Official Authorized to Bind Agency (Name, address & telephone) Ronald Yoder, Executive Director 2281 N.W. Everett Portland, OR 97210 228-7238	

11. Project Summary: Summarize, in approximately 200 words, the project plan presented in application, briefly covering project goals, objectives, strategy, target population and administration.

The goal of this service is to provide Housekeeper/Homemaker/and Comprehensive Social Case Management III to eligible frail persons who need these services as part of a case plan to enable them to remain in their own homes rather than go into nursing homes or institutions; and to prevent and correct neglect and/or exploitation of persons who may not be able to act in their own best interest. The goal will be satisfied through the implementation of contract objectives providing for Metropolitan Family Service to maintain leadership and administrative management of its Homemaker and Geriatric Services Divisions, the acceptance of referrals for service from the Area Agency on Aging's District Centers and other sources approved by AAA and by the provision of 13,423 hrs. of Housekeeper Service, 9,615 hours of Level I Homemaker Service, 14,283 hrs. of Level II Homemaker Service and the provision of 4,104 hours of Case Management III services to at least 108 individuals requiring that service. Service strategy encompasses an assessment of client needs to assure correct level of service and coordination of services with referral source and community agencies; the continued assessment and monitoring of Housekeeper and Homemaker Level I cases. Service strategy also includes acceptance of prime responsibility for Level II Homemaker clients and Level III Case Management clients, the development of working agreements with community resources necessary for client service, cooperation, support and coordination with family members, and extensive use of Volunteer Services when appropriate. These services will be provided to residents of Multnomah County who need the service to sustain independent living, who have no other agency, friend or relative provide the service, who are 60 years of age and whose income does not exceed the OPI and MA guidelines. Every effort will be made to provide an even flow of service throughout the contract year. Adequate administrative and programmatic support will be provided to ensure effective and efficient operation of the contract under the policies established by MFS Board of Directors.

PROJECT NARRATIVE

1. Statement of Problem/Documentation of Need: (Provide a concise description of the conditions and problems to be addressed by the project. Quantifiable, measurable terms should be used. Verify that the problem exists with documentation.)

Elderly individuals at times face crisis situations in which they require immediate and intensive assistance in order to maintain normal functioning. When such situations arise, elderly persons are often in danger of neglect or exploitation because of inadequate income, declining health, social isolation and lack of knowledge of available service. Declining health and physical strength make it increasingly difficult for many physically and mentally impaired frail elderly persons to perform routine household and personal care tasks necessary to sustain independent living. An array of services must be employed to alleviate the situation of persons in danger of neglect or exploitation, extending in some cases to a long term plan to insure such protective services as a shelter care, medical assistance, counseling, guardianship, legal and financial assistance and housekeeper and homemaker service. The Federal Council on the Aging (1976) stated that 10% of the nation's population was then over 65 and that number was continuing to increase and that health problems, acute and chronic, occur more frequently after this age. A 1975 Portland Study indicates 96,305 residents of Multnomah County are over 60. A study by Ethel Shanas in 1971 indicates that 19% of persons in that category are physically or mentally impaired to the degree that homemaker / housekeeper services are needed to sustain independent living. A 1975 study by the Committee on Aging estimates that 20% of the present nursing home population would not require such care if in-home assistance were available. Locally about 100 persons are committed to state mental hospitals per year. A 1970 Tri-County Community Council survey suggests that as many as 4,900 persons in Multnomah County may need some degree of protective service. Of the 96,306 persons over the age of 60 (1975) 14.5% are between 75 and 79, 10% between 80 and 84, 5.6% are 85 and over. The 1970 census states that 16% of persons over 60 have incomes below the poverty level. With the rate of inflation since those figures were taken, one can assume the percentage to be higher at this time. 24% of these elderly persons live alone. The population of high risk frail elderly indicates the need for housekeeper, homemaker and the intensive casework and protection of Level III Case Management services.

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2. Statement of Project Goals: (The project goal is a brief statement of the intent of the project to change, reduce or eliminate the problem identified above. The goal should relate to overall goal statement of HRB's Divisional Unit and to the general purpose of the project.)

To prevent or postpone institutionalization, promote independent and dignified living, prevent neglect and exploitation and reduce social isolation for the frail elderly residing in Multnomah County through a cooperative service system with the community and by the provision of Housekeeping, Homemaking and Comprehensive Social Service Case Management III services.

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3. Statement of Objectives and Productivity Indicators: (Set forth, in measurable, timebounded statements the desired results of program operations. For each objective listed, state the productivity indicator, or unit of measurement, by which the objective can be evaluated.)

Objectives:	Productivity Indicators:
<p>1-To maintain effective leadership and administrative management of the In-Home Support Services Project during Fiscal Year 1980-81 through accomplishment of activities listed in Section 4.</p>	<p>1-a Number and dates of activities listed in Section 4 accomplished.</p>
<p>2-To prevent or postpone institutionalization by maintaining a clean and safe environment for disabled or frail elderly individuals by accepting referrals for housekeeper service from AAA District Centers and by providing 13,243 hours of housekeeper service,* 10% of which is short term (three months or less) during Fiscal Year 1980-81.</p>	<p>2-a Number of referrals accepted by referral source</p> <p>2-b Number of referrals denied by referral source and reason for denial.</p> <p>2-c Number of long term hours provided.</p> <p>2-d Number of short term hours provided.</p>
<p>3-To prevent or postpone institutionalization by maintaining a clean, safe, and healthful environment for disabled or frail elderly individuals by accepting referrals for Homemaker I service from AAA District Centers and by providing 9,615 hours of Homemaker I service* during Fiscal Year 1980-81.</p>	<p>3-a Number of referrals accepted by referral source.</p> <p>3-b Number of referrals denied by source of referral and reason denied.</p> <p>3-c Number of hours of service provided.</p>
<p>4-To prevent or postpone institutionalization of elderly and frail individuals with physical or mental impairment by accepting referrals from AAA District Centers and by providing 14,283 hours of Homemaker II services* during FY 1980-81.</p>	<p>4-a Number of referrals accepted by referral source.</p> <p>4-b Number of referrals denied by source of referral and reason denied.</p> <p>4-c Number of hours of service provided.</p>
<p>5-To prevent or postpone institutionalization of endangered frail elderly individuals with complex social/emotional/physical problems by accepting referrals from AAA District Centers and other sources as approved by the AAA and by providing _____ hours of case management III services* to 108 different individuals who meet established needs criteria with an average of 81 individuals receiving service each month during FY 1980-81.</p>	<p>5-a Number of referrals accepted by source.</p> <p>5-b Number of referrals denied by source and reason for denial.</p> <p>5-c Number of client service hours produced.</p> <p>5-d Number of clients served.</p>

\*Provision of services shall be in accordance with policies and procedures as specified by the AAA in Desired Work Units.

Objective # I : (Restate Objective Here)

To maintain effective leadership and administrative management of the In-Home Support Services Project during Fiscal Year 1980/81 through accomplishment of activities listed in Section 4.

No.	Activity	Completion Date	Measure of Activity Completion	Staff Assigned
1.1	Continue to maintain sufficient fully qualified and experienced social service staff to fulfill contract expectations.	Ongoing	All vacancies filled with qualified personnel	6 FTE social workers. 1.35 Master's in Social Work supervisor.
1.2	Provide on staff a registered nurse and occupational therapist to provide casework seminars to clients requiring personal care and adaptive services.	7-1-80	All vacancies filled with qualified personnel	1 FTE registered nurse. 1/10 FTE registered occupational therapist.
1.3	Continue to provide for efficient scheduling and coordination of homemaker assignments by maintaining qualified scheduling staff.	Ongoing	All vacancies filled with qualified personnel	.60 Homemaker Coordinator
1.4	Continue to maintain sufficient fully qualified and trained homemaker/housekeeper staff to fulfill expectations of contracts.	Ongoing	Homemaker/Housekeeper positions filled with qualified staff.	Approximately 22 permanent homemakers. 8 on-call substitute homemakers.
1.5	Establish expectations for staff performance	Ongoing	Direct service objective, case-load expectations, record keeping expectations.	All staff involved plus administration of agency.
1.6	Manage overall performance of program by the development of annual plans, scheduling of staff meetings and process for case assignment.	8-31-80 Twice monthly. Ongoing as needed respectively.	Annual plan completed. Staff meetings held. Cases assigned.	
1.7	Provide staff supervision through regular periodic conferences between supervisor and social work staff, between agency administration and supervisor, between Homemaker Supervisor and Homemakers.	Weekly, twice/mo. respectively.	Conferences held as scheduled	Supervisory staff

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4. Statement of Activities/Timelines/Staff Assigned for Each Objective: (List as many activities as necessary to outline the work product.)

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Objective # I : (Restate Objective Here)

To maintain effective leadership and administrative management of the In-Home Support Services Project during Fiscal Year 1980/81 through accomplishment of activities listed in Section 4.

No.	Activity	Completion Date	Measure of Activity Completion	Staff Assigned
1.8	Evaluate staff performance annually	9-30-80 9-30-81	Written evaluations in personnel files.	Supervisory staff
1.9	Provide continuing staff training in assessment, case planning and service delivery and on needs of the elderly.	Ongoing	Development and completion of Homemaker Service staff development and training program. Staff participation in total agency training program, in AAA training sessions and in relevant training offered in community.	Supervisory staff
1.10	Facilitate the communication and service between program elements providing service in this contract and other service programs within Metropolitan Family Service.	Twice/mo.	Attendance at agency management staff meetings.	Supervisory staff
1.11	Assure the continuous familiarity of the agency's Board of Directors with this contracted program.	Monthly	Attendance at Board meetings by Division Directors.	Supervisory staff.
1.12	Provide for monitoring of income and expenditures of Geriatric Services and Homemaker Services to insure effective fiscal management and efficient operation.	Monthly Quarterly	Fiscal information maintained on a monthly basis. Attendance at agency contract quarterly review meetings.	Agency administration, fiscal officer and entire staff.
1.13	Continually monitor the contract to assure contract expectations are being met.	Monthly Quarterly	Program information tabulated on a monthly basis. Attendance at agency quarterly review meetings.	Contract Manager
1.14	Provide for communication and understanding between the AAA, the 8 Senior Centers, special projects and Metropolitan Family Service.	Monthly Monthly As Needed  Semi-annually Ongoing	Attendance of AAA contractor's meetings. Advisory Board Meeting Attendance at other meetings or activities as appropriate and needed. Geriatric and Homemaker staff meet with Senior Center staff on a scheduled basis/as needed.	Appropriate staff as indicated. Contract Manager Appropriate staff as indicated Supervisors and staff as indicated.

4. Statement of Activities/Timelines/Staff Assigned for Each Objective: (List as many activities as necessary to outline the work product.) MFS 80-81



Objective # I : (Restate Objective Here)

To maintain effective leadership and administrative management of the In-Home Support Services Project during Fiscal Year 1980/81 through accomplishment of activities listed in Section 4.

No.	Activity	Completion Date	Measure of Activity Completion	Staff Assigned
1.15	Facilitate communication and coordination of service and information by having the established procedures and forms necessary for: <ul style="list-style-type: none"> <li>a. Referral procedures for Homemaker/Housekeeper and Case Management III.</li> <li>b. MFS waiting list policy</li> <li>c. Priority policy</li> <li>d. Allocation of available service policy.</li> <li>e. Criteria for eligibility for Levels I &amp; II Homemaker/Housekeeper and Level III Case Management services.</li> <li>f. Homemaker/Housekeeper assignment sheet.</li> <li>g. Change in Level of service request form</li> <li>h. Case staffing procedures.</li> <li>i. Comment/problem form</li> <li>j. Procedures for the coordination of Housekeeper/Homemaker service with Centers holding prime responsibility for case plan.</li> <li>k. Procedures for the coordination of MFS Homemaker and Case Management III cases with Center services.</li> </ul>	7-1-80 7-31-80	Procedures and forms developed. Procedures and forms approved by AAA  (suggested procedures attached)	Contract Manager
1.16	Inform AAA District Centers of these contract procedures and forms, in accompaniment with AAA staff.	7-31-80 7-31-81	Procedures explained at July AAA contractors meeting	Contract Manager & AAA staff
1.17	Develop or plan for the appropriate allocation of Homemaker/Housekeeper service throughout the service area in conjunction with AAA staff.	9-1-80	Plan developed and agreed	Contract Manager & AAA staff.
1.18	Manage the provision of Homemaker/Housekeeper service so as to assure as nearly as possible an even flow of service throughout the year.	Ongoing/mo.	Documented by service hour reports to AAA	Contract Manager Supervisory staff

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4. Statement of Activities/Timelines/Staff Assigned for Each Objective: (List as many activities as necessary to outline the work product.)

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Objective # I : (Restate Objective Here)

To maintain effective leadership and administrative management of the In-Home Support Services Project during Fiscal Year 1980/81 through accomplishment of activities listed in Section 4.

No.	Activity	Completion Date	Measure of Activity Completion	Staff Assigned
1.19	Work with the Area Agency on Aging and its District Centers to establish a procedure for implementation of a fee scale for Case Management III and Homemaker/Housekeeper services, to include: a. Procedure for assessing fee. b. Procedure for implementing fee. c. Procedure for notifying appropriate Center of fee assessed client for which they have prime. d. Procedures for reporting and collecting fee income.	Within 30 days of when fee scale is implemented	Fee scale procedures established (suggested procedures attached)	Agency Administration & Contract Manager.
1.20	Assist and cooperate with the City of Portland and the Area Agency on Aging in the continual development of a system of services to the elderly by: a. Participating in area meeting. b. Giving technical assistance. c. Providing suggestions and comments on materials and issues.	As required	Meetings attended	Contract Manager, Agency Administration and social work staff.
1.21	Accept referrals from referral sources in a timely, orderly fashion. Monitor any developing problems related to intake procedures.	Ongoing as needed	Intake procedures followed Problems documented and followed up.	.66 Intake worker

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4. Statement of Activities/Timelines/Staff Assigned for Each Objective: (List as many activities as necessary to outline the work product.)  
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Objective # II : (Restate Objective Here) To prevent or postpone institutionalization by maintaining a clean and safe environment for disabled or frail elderly individuals by accepting referrals for Housekeeping Service from AAA District Centers and by providing 13,423 hours of Housekeeper Service, 10% of which is short term (3 mo. or less) during Fiscal Year 1980/81.

No.	Activity	Completion Date	Measure of Activity Completion	Staff Assigned
2.1	Accept referrals for long term Housekeeper Service from the Area Agency on Aging's 8 District Centers in accordance with developed and established referral procedures.	7-30-80  Ongoing	Procedures developed and approved as stated in Objective 1.15. (Suggested procedures attached) Documented by record of referrals accepted and case record	Contract Manager  Intake worker
2.2	Accept referrals for short term Housekeeper Service (10% of total Housekeeper Service) from the AAA 8 District Centers in accordance with developed and established procedures.	7-30-80  Ongoing	Procedures developed and approved as stated on Objective 1.15. (Suggested procedures attached) Documented by case record and monitoring procedures and referrals accepted	Intake worker  Intake worker Social worker
2.3	Assess appropriateness of referrals in accordance with need and eligibility for service.	Ongoing	Decision of intake worker on action taken documented as accepted or denied by intake worker.	Intake worker & social work staff
2.4	Maintain records on referrals for Housekeeper Service long and short term.	Ongoing	Records maintained monthly of # of referrals, action taken, and reason for denial if service not provided by intake worker.	Intake worker
2.5	Establish procedures for assignment of referral to MFS social work staff.	8-31-80	Written procedures established and on file.	Supervisor
2.6	MFS social worker will conduct an initial assessment of clients needs to determine: a. if housekeeping service is appropriate; b. orientate the client to use of service; c. to establish tasks to be performed.	Ongoing	Documented by completion of "client needs assessment" and "housekeeper assignment" forms	Social work staff

4. Statement of Activities/Timelines/Staff Assigned for Each Objective: (List as many activities as necessary to outline the work product.)

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Objective # II: (Restate Objective Here) To prevent or postpone institutionalization by maintaining a clean safe environment for disabled or frail elderly individuals by accepting referrals for Housekeeping Service from AAA District Centers and by providing 13,423 hours of Housekeeper Service, 10% of which is short term (3 mo. or less) during Fiscal Year 1980/81.

No.	Activity	Completion Date	Measure of Activity Completion	Staff Assigned
2.7	MFS social worker will inform District Center of results of client assessment according to established housekeeper coordination procedures and forms.	7-31-80 Ongoing	Written procedures established and approved. (Objective 1.15) Procedures followed	Social work staff.
2.8	Housekeeper Service will be scheduled in accordance with established referral and priority policies	7-31-80 Ongoing	Written procedures and forms established and approved (Obj. 1.15) Procedures followed	Social worker Scheduler
2.9	Communication between District Center Case Management and MFS Housekeeper Service will be assured by following established procedure for informing case managers of needs, changes and problems in situation experienced by client observed by housekeeper and/or social worker.	7-31-80 Ongoing	Written procedures and forms established and approved (Obj. 1.15) Procedures followed.	Social work staff
2.10	Hold preplacement conference with housekeeper to acquaint her with duties.	Ongoing before assignment	Conferences held between social worker and housekeeper	Social work staff
2.11	Participate in case staffing or conferences with District Centers or other agency that are necessary to promote coordination of Housekeeping Service with case management plans.	Ongoing as needed	Staffing and conferences participated in.	Supervisory & social work staff. Homemakers if indicated.
2.12	Designated MFS staff member shall monitor Housekeeping cases to insure that Housekeeper Service is being used appropriately and that changes in type, number and level of service is communicated to case manager by home visit every 6 months and as need indicates.	Ongoing	Established procedures for Housekeeper case coordination followed. Home visits made as documented by case plan.	Social work staff

4. Statement of Activities/Timelines/Staff Assigned for Each Objective: (List as many activities as necessary to outline the work product.)

Objective # II : (restate objective here) to prevent or postpone institutionalization by maintaining a clean and safe environment for disabled or frail elderly individuals by accepting referrals for Housekeeping Service from AAA District Centers and by providing 13,423 hours of Housekeeper Service, 10% of which is short term (3 mo. or less) during Fiscal Year 1980/81.

No.	Activity	Completion Date	Measure of Activity Completion	Staff Assigned
2.13	Changes in Housekeeper Service will be made in coordination with case manager in accordance with established procedures.	Ongoing	Established procedures followed for coordination of Housekeeper Service (Obj. 1.15)	Social work staff
2.14	Notify clients of any temporary changes in housekeeper scheduled time.	Ongoing as needed	Clients notified by service coordinator	Scheduler
2.15	Arrange for substitution of absent housekeeper.	Ongoing as needed	Substitution arranged and scheduled.	Homemaker Supervisor Scheduler
2.16	Maintain records of Housekeeper Service hours, long and short term.	Monthly by 5th working day.	Records maintained of # of hrs. of Housekeeping Service (long and short term) provided recorded by client and reported to AAA	Contract Manager
2.17	Provide for supervision for housekeepers by group, individual and phone conference.	Monthly Monthly Weekly as needed.	Group supervision held. Individual supervision held Phone conferences held	Homemaker Supervisor
2.18	Provide for orientation of new housekeeper staff by presenting orientation session of minimum of 4 hours, dealing with the areas of the agency, job responsibilities and the client.	Ongoing as needed.	Orientation sessions held	Homemaker Supervisor
2.19	Provide career ladder for housekeepers to become homemakers by providing a minimum of 24 hours of training per year in the areas of: a. the agency, community and homemakers b. the family and the homemakers c. care and maintenance of the home d. first aid and accident prevention e. family budgeting and money management f. nutrition and food preparation g. the aged person	Ongoing	Training held. Record of training received in personnel files.  See attachments for proposed training schedule 80/81	Homemaker Supervisor

4. Statement of Activities/Timelines/Staff Assigned for Each Objective: (List as many activities as necessary to outline the work product.)

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Objective # II : (Restate Objective Here) To prevent or postpone institutionalization by maintaining a clean and safe environment for disabled or frail elderly individuals by accepting referrals for Housekeeping Service from AAA District Centers and by providing 13,423 hours of Housekeeper Service, 10% of which is short term (3 mo. or less) during Fiscal Year 1980/81.

No.	Activity	Completion Date	Measure of Activity Completion	Staff Assigned
2.19 cont.	h. mental and emotional disturbance i. the ill and mentally and physically disabled. j. personal care and rehabilitation services  Training to be provided by professionals in the various fields of knowledge in large and small group sessions.			
2.20	Submit client tracking forms in accordance with CTS instructions and procedures.	Ongoing	Forms submitted	Contract Manager Supervisor Social work staff
2.21	Provide for coordination of service by providing the 8 District Centers with list of clients served, by intake and closing dates.	Once/quarter	Reports compiled and sent	Contract Manager

4. Statement of Activities/Timelines/Staff Assigned for Each Objective: (List as many activities as necessary to outline the work product.)

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Objective # III : (Restate Objective Here)

To prevent or postpone institutionalization by maintaining a clean, safe and healthful environment for disabled or frail elderly individuals by accepting referrals for Homemaker I service from AAA District Centers and by providing 9,615 hours of Homemaker I service during FY 1980-81.

No.	Activity	Completion Date	Measure of Activity Completion	Staff Assigned
3.1	Accept referrals for long term homemaker service from the Area Agency on Aging's 8 District Centers and special projects in accordance with developed and established referral procedures.	Ongoing	Procedures developed and approved as stated in Objective 1.15. Referrals accepted.	Contract Manager Intake worker
3.2	Assess appropriateness of referrals by intake worker in accordance with need for service and eligibility for service.	Ongoing	Decision of intake worker on action taken documented as accepted or denied by intake worker	Intake worker
3.3	Maintain records on referrals for Homemaker I service.	Ongoing	Records maintained monthly of # of referrals, action taken, and reason for denial if service not provided by intake worker.	Intake worker
3.4	Establish procedures for assignment of referral to MFS social work staff for assessment and ongoing monitoring of homemaker service.	8-31-80	Written procedures established and on file.	Contract Manager
3.5	MFS social worker will conduct an initial assessment of clients needs to determine: a. if Homemaker I Service is appropriate b. orientate the client to use of service c. to establish tasks to be performed.	Ongoing	Documented by completion of "client needs assessment" and "homemaker assignment" forms.	Social work Supervisor & social worker.
3.6	MFS social worker will on completion of client assessment conduct an initial case staffing in accordance with established Homemaker I assessment and coordination procedures. Staffing will include Center case manager, social worker and may include the homemaker if appropriate.	8-31-80 Ongoing Ongoing	Written procedures established and approved. (Objective 1.15) Procedures followed. Initial case staffings held by phone or in-person as indicated.	Contract Manager Social work Supervisor & social worker.

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4. Statement of Activities/Timelines/Staff Assigned for Each Objective: (List as many activities as necessary to outline the work product.) MFS 80-81

Objective # 111 : (restate objective here)

prevent or postpone institutionalization by maintaining a clean, safe and healthful environment for disabled or frail elderly individuals by accepting referrals for Homemaker I service from AAA District Centers and by providing 9,615 hours of Homemaker I service during FY 1980-81

No.	Activity	Completion Date	Measure of Activity Completion	Staff Assigned
3.7	Homemaker I service will be scheduled in accordance with established referral and priority policies.	7-31-80  Ongoing	Written procedures and forms established and approved (Obj. 1.15). Procedures followed.	Social worker  Scheduler
3.8	Hold placement conference with homemaker to acquaint her with her duties for the client. Introduce homemaker to client.	Ongoing	Pre-placement conference held. Homemaker introduced.	Social worker.
3.9	MFS will request additional staffings on Homemaker I cases with the Center case manager at the minimum of every six months to discuss service and to provide for coordination of service with Center case management plans.	Ongoing at 6 month intervals	Staffings conducted by phone or in-person as indicated	Social work supervisor & social worker
3.10	Communication between District Center case management and MFS homemaker service will be assured by following established procedure for informing case managers of needs, changes and problems in situation experienced by client observed by homemaker and/or social worker.	8-31-80  Ongoing	Written procedures and forms established and approved (Objective 1.15) Procedures followed.	Contract Manager  Social work supervisor
3.11	Designated MFS staff member shall monitor homemaking cases to insure that homemaker service is being used appropriately and that changes in type, number and level of service is communicated to case manager, by home visit every 6 months and as need indicates.	Ongoing	Established procedures for homemaker case coordination followed. Home visits made as documented by case plan.	Social work supervisor.
3.12	Changes in homemaker service will be made in coordination with case manager in accordance with established procedures.	Ongoing	Established procedures followed for coordination of homemaker service (Objective 1.15)	Social worker Scheduler

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4. Statement of Activities/Timelines/Staff Assigned for Each Objective: (List MFS as many activities as necessary to outline the work product.)  
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Objective # III : (Restate Objective Here)

To prevent or postpone institutionalization by maintaining a clean, safe and healthful environment for disabled or frail elderly individuals by accepting referrals for Homemaker I service from AAA District Centers and by providing 9,615 hours of Homemaker I service during FY 1980-81

No.	Activity	Completion Date	Measure of Activity Completion	Staff Assigned
3.13	Arrange for client to be evaluated by staff registered nurse if there is indication of: a. multiple medication b. catheter or ostomy care required. c. decubitus care d. wounds requiring dressing e. bowel care f. transfer assistance g. pressure relief and repositioning, paralysis, weakness h. acute disorientation or confusion	When indicated	Evaluation done and documented in case record	Social worker
3.14	Provide District Center with report of nurse evaluation and recommendations.	After each evaluation	Reports given and documented in case record.	Nurse
3.15	Nurse to assume supervision of homemaker in case if indicated.	When indicated	Case transferred and documented in case record.	Social worker Nurse
3.16	Arrange for transfer of case to Level II Homemaker service if indicated.	When indicated.	Transfer of prime and Level made documented in record and 101 form.	Nurse
3.17	Arrange for evaluation of client by registered occupational therapist if indicated by service need.	Ongoing as needed	Evaluation completed	Social worker O.T. Consultant
3.18	Prepare report and recommendations of O.T. evaluation.	Upon evaluation	Report prepared and in case record	O.T. Consultant
3.19	Notify clients of any temporary changes in housekeeper scheduled time.	Ongoing as needed	Clients notified.	Scheduler
3.20	Arrange for substitution of absent homemaker.	Ongoing as needed	Substitution arranged and scheduled.	Scheduler
3.21	Maintain records of homemaker hours and report to AAA	Monthly by 5th working day	Records maintained of # of AAA hours of Homemaker I service provided recorded by client and reported to AAA.	Contract Manager

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 Activities/line item - all Assigned for ed. receive:  
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Objective # III : (restate objective here)

prevent or postpone institutionalization by maintaining a clean, safe and healthful environment for disabled or frail elderly individuals by accepting referrals for Homemaker I service from AAA District Centers and by providing 9,615 hours of Homemaker I service during FY 1980-81

No.	Activity	Completion Date	Measure of Activity Completion	Staff Assigned
3.22	Provide for supervision of homemaker by group, individual and phone conferences.	Monthly Monthly 1 Weekly as needed	Group supervision held Individual supervision held Phone conferences held	Homemaker Supervisor
3.23	Provide procedures and training for homemaker staff in accordance with HRB rules 10-20-000	8-1-80	Procedure developed	Homemaker Supervisor
3.23a	<p>Training of new inexperienced homemakers as follows: *</p> <p><u>40 hours of theory/training to include:</u></p> <ul style="list-style-type: none"> <li>a. the agency, the community and the homemaker</li> <li>b. the family and the homemaker</li> <li>c. care and maintenance of the home</li> <li>d. first aid and accident prevention</li> <li>e. family budgeting and money management</li> <li>f. nutrition and food preparation</li> <li>g. the aged person</li> <li>h. mental and emotional disturbance</li> <li>i. the ill and mentally and physically disabled</li> <li>j. personal care and rehabilitation service</li> </ul> <p>20 hours of which will be provided in an orientation seminar before serving clients. The 20 additional hours will be provided during first 3 months of service.</p>	As needed	Training sessions held and documented (procedures attached)	Homemaker Supervisor.
3.23b	<p>Provide for 20 hours of supervised field experience in the home of clients by accompanying a trained homemaker and providing service under the experienced homemaker's direction.</p> <p>* These procedures will be modified as needed to conform with final draft In-Home Service Rules 10-20-000</p>	As needed	Field experience provided and documented	Homemaker Supervisor.

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4. Statement of Activities/Timeline/Staff Assigned for Each Objective: (List as many activities as necessary to outline the work product.)

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prevent or postpone institutionalization by maintaining a clean, safe and healthful environment for disabled or frail elderly individuals by accepting referrals for Homemaker I service from AAA District Centers and by providing 9,615 hours of Homemaker I service during FY 1980-81

No.	Activity	Completion Date	Measure of Activity Completion	Staff Assigned
3.24	Provide a minimum of 24 hours of additional homemaker training to expand upon and enhance original training to include: a. Training given in the area of providing in-home assistance to elderly clients with differing physical problems. Large and small group training sessions are provided by nurse and occupational therapy consultants and professionals from community. b. Training in understanding the psychological problems of aging and working in the homes of clients with special psychological problems provided in large group and small group training sessions by consulting psychiatrist and advanced social work staff of MFS and professionals from the community. c. Training in home management and performance of household tasks provided by professionals in the community such as home economist liaison.	Appropriately Monthly	Training sessions held	Homemaker Supervisor
3.26	Submit client tracking forms in accordance with CTS instructions and procedures.	Ongoing	Forms submitted	Social worker Contract Manager
3.27	Provide for coordination of services by providing the 8 District Centers with list of clients served by incoming date and closing date.	Quarterly	-	Contract Manager

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4. Statement of Activities/Timelines/Staff Assigned for Each Objective: (List MFS as many activities as necessary to outline the work product.) 80-81

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Objective # IV : (Restate Objective Here)

To prevent or postpone institutionalization of elderly and frail individuals with physical or mental impairment by accepting referrals from AAA District Centers and by providing 14,283 hours of Homemaker II service during FY 1980-81.

No.	Activity	Completion Date	Measure of Activity Completion	Staff Assigned
4.1	Accept referrals for Homemaker II service from the AAA 8 District Centers and special projects in accordance with developed and established referral procedures.	7-30-80 Ongoing	Procedures developed and approved (Obj. 1.15) Referrals accepted and documented by case record and monitoring process.	Contract Manager Intake worker
4.2	Assess appropriateness of referrals by intake worker in accordance with need for service and eligibility for service.	Ongoing	Decision of intake worker and of action taken documented as to acceptance or denial.	Intake worker
4.3	Maintain records of referrals for homemaker service.	Ongoing	Records maintained monthly of # of referrals, action taken and reason for denial if service not provided by intake worker.	Intake worker
4.4	Establish procedures for assignment of referral to MFS social work staff.	7-31-80	Written procedures established and on file.	Contract Manager
4.5	Accept prime responsibility for all Homemaker II cases	Ongoing	Prime transferred to MFS by Center	District Centers Social work Supervisor.
4.6	MFS social worker to perform professional in-depth needs assessment to determine full extent of need and appropriate level of in-home homemaker assistance and for additional services and social work needs.	Ongoing	Documented by completion of Homemaker Division intake assessment form by worker, AAA form 101 & 102 as needed.	Social work Supervisor. Social worker
4.7	MFS social worker will inform Center of results of client assessment according to established Homemaker II coordination procedures and forms.	7-31-80 Ongoing	Written procedures established (Objective 1.15) - Procedures followed	Contract Manager Social worker Social work Super.
4.8	If indicated, arrange for staffing regarding referred client with referral source for purpose of coordination, exchanging needed information and resolving differences.	Ongoing as needed	# of staffings held documented in case record.	Social work Super. Social worker

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4. Statement of Activities/Timelines/Staff Assigned for Each Objective: (List as many activities as necessary to outline the work product.)  
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Objective # IV : (Restate Objective Here)

To prevent or postpone institutionalization of elderly and frail individuals with physical or mental impairment by accepting referrals from AAA District Centers and by providing 14,283 hours of Homemaker II service during FY 1980-81

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No.	Activity	Completion Date	Measure of Activity Completion	Staff Assigned
4.9	As agency with primary responsibility, develop a case plan for homemakers and social work service that include as a minimum the elements described under AAA requirements for Level II case management and case files.	Ongoing	Case plan developed Case file made up	Social worker
4.10	Provide Homemaker II service scheduling in accordance with established referral and priority policies.	Ongoing As referred	Written procedures established (Objective 1.15) Referrals accepted and scheduled	Contract Manager Scheduler
4.11	Hold pre-placement conference with homemaker to discuss with her the case plan, the client's situation and her responsibilities with the client.	Ongoing before assignment	Conferences held by social worker and homemaker.	Social worker
4.12	Introduce client to homemaker and explain service to client in in-home visit.	Ongoing	# of in-home homemaker placements held by social worker in client's home documented by case record.	Social worker
4.13	With client's permission, request from client's physician health information necessary for complete assessment and case plan.	Ongoing	Report in case file when permission given.	Social worker
4.14	Request information from (with client's permission) any other agencies providing service to the client with object of coordinating services.	Ongoing	Coordination documented in case record.	Social worker
4.15	Make referrals for needed ongoing maintenance services (volunteer, friendly visiting, telephone reassurance, shopping) to District Centers.	Ongoing as needed	Documented by AAA 103 forms	Social worker

4. Statement of Activities/Timelines/Staff Assigned for Each Objective: (List as many activities as necessary to outline the work product.)

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Objective # IV : (Restate Objective Here)

To prevent or postpone institutionalization of elderly and frail individuals with physical or mental impairment by accepting referrals from AAA District Centers and by providing 14,283 hours of Homemaker II service during FY 1980-81

No.	Activity	Completion Date	Measure of Activity Completion	Staff Assigned
4.16	Make referrals for additional needed services to community. Provide and act as advocate on behalf of the client to those sources if needed.	Ongoing as needed	Documented by AAA 103 forms and case records.	Social worker
4.17	Provide supportive counseling services to client as needed.	As needed	Documented in case record	Social worker.
4.18	Consult with Occupational Therapist concerning client and when indicated, arrange for visit of OT for assessment and training of client.	Ongoing as indicated	Documented by OT consultation form in case record	Social worker
4.19	Develop contracts with family members to assist in case planning, service provision and coordination.	Ongoing	Documented by case record	Social worker
4.20	MFS social worker will initiate and/or take part in case staffing and conferences necessary to coordinate services to the client in accordance with accepted Homemaker II assessment monitoring and coordination procedures.	Ongoing as needed	Documented by case record	Social worker
4.21	MFS social worker shall monitor Homemaker II cases so as to insure appropriate level of homemaker service, progress toward goals and that the continuing needs of the client are met within limits of available service and will provide a reassessment and case plan update every 3 months.	Ongoing every 3 months	Documented by case record Documented by AAA 102 forms and case record	Social worker
4.22	Arrange for client to be evaluated by staff registered nurse if there is indication of: a. multiple medication b. catheter or ostomy care required c. decubitus care d. wounds requiring dressing e. bowel care	As indicated	Referral made and documented in case record	Social worker

4. Statement of Activities/Timelines/Staff Assigned for Each Objective: (List MFS as many activities as necessary to outline the work product.)

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Objective # IV : (Restate Objective Here)

To prevent or postpone institutionalization of elderly and frail individuals with physical or mental impairment by accepting referrals from AAA District Centers and by providing 14,283 hours of Homemaker II service during FY 1980-81

No.	Activity	Completion Date	Measure of Activity Completion	Staff Assigned
4.22 cont.	f. transfer assistance g. pressure relief and repositioning, paralysis, weakness. h. acute disorientation or confusion.	As indicated	Referral made and documented in case record	Social worker
4.23	Provide written report and recommendations of nurse evaluation.	When evaluation made	Report written and in case file	Nurse
4.24	Arrange for nurse to assume case management responsibilities when medical problems are prime concern	As indicated	Case transferred to nurse and documented in case record	Social worker Nurse
4.25	Nurse to provide case management as described in 4.6 through 4.22	Ongoing as indicated	Documented in case record	Nurse
4.26	Maintain records of Homemaker II hours provided.	Monthly by 5th working day of month	Records maintained of # of hours of Homemaker II hours provided by client and reported to AAA	Contract Manager
4.27	Notify client of any changes in homemaker scheduled time.	Ongoing as needed.	Client notified	Scheduler Social worker
4.28	Arrange for substitution of absent homemaker	Ongoing as needed	Substitution arranged	Scheduler
4.29	Provide for supervision of homemaker by group, individual and phone conference.	Monthly Monthly	Group supervision held Individual supervision held Phone conference held	Homemaker Super. Social worker
4.30	Provide for training of new inexperienced homemakers and for in-service training as described in 3.21 - 3.22	As indicated Ongoing	Training sessions held	Homemaker Super.
4.31	Submit client tracking forms in accordance with CTS instruction and procedures	Ongoing	Forms submitted	Social work Super. Social worker

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4. Statement of Activities/Timelines/Staff Assigned for Each Objective: (List as many activities as necessary to outline the work product.)

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Objective # V : (Restate Objective Here) to prevent or postpone institutionalization of endangered frail elderly individuals with complex social/emotional/physical problems by accepting referrals from AAA District Centers and other sources as approved by AAA and by providing 4,104 hours of case management III services to 108 different individuals who meet established need criteria with an average of 81 individuals receiving service each month during FY 1980-81

No.	Activity	Completion Date	Measure of Activity Completion	Staff Assigned
5.1	Accept referrals for clients in need of immediate comprehensive social casework from the AAA 8 District Centers, hospitals, Public Health Nurse, relatives and the courts in accordance with developed and established referral procedures.	7-30-80	Procedures developed and approved (Obj. 1.15)	Contract Manager Intake worker
5.2	Assessment of appropriateness of referrals by intake worker in accordance with need for service and eligibility for service.	Ongoing upon referral	Decision of intake worker and of action taken documented as to acceptance or denial.	Intake worker
5.3	Maintain record of referrals for case management III cases.	Ongoing	Records maintained monthly of # of referrals, action taken and reason for denial of service not provided by intake worker.	Intake worker
5.4	Establish procedures for assignment of referrals to MFS social work staff	7-31-80	Written procedures established and on file.	Social work Super.
5.5	Accept prime responsibility for all case management III cases accepted from AAA District Centers and other referral sources.	Ongoing	Prime transferred to MFS by District Centers.	District Centers Intake worker Social worker
5.6	Provide for a social work case management team to provide case management III services to clients. Team to include social worker, case manager and professional advanced social worker at the MSW level or above.	Ongoing	Case management team established	Social work Super.
5.7	Provide for each case a bio-psycho-social assessment of the client as an aid to establishing client needs.	Ongoing upon referral	Written assessment in case record.	Social worker
5.8	Arrange for obtaining information of client's physical health from client's physician.	Ongoing	Documented in case file	Social worker
5.9	Develop a case plan for the client including as a minimum, the requirement for case established by AAA.	Ongoing after assessment	Written case plan in case record	Social worker

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4. Statement of Activities/Timelines/Staff Assigned for Each Objective: (List MFS as many activities as necessary to outline the work product.)  
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elderly individuals with complex social/emotional/physical problems by accepting referrals from AAA District Center and other sources as approved by AAA and by providing 4,104 hours of case management III services to 108 different individuals who meet established need criteria with an average of 81 individuals receiving service each month during FY 1980-81

No.	Activity	Completion Date	Measure of Activity Completion	Staff Assigned
5.10	Coordinate all community services being provided to the client.	Ongoing	Documented in case record	Social worker
5.11	Refer to AAA for limited access services such as, transportation, homemaker, required to sustain independent living, according to AAA referral process.	Ongoing as needed.	Documented by case plan AAA 103 forms	Social worker
5.12	Refer to community agencies for needed appropriate services.	Ongoing as needed	Documented by case plan AAA 103 forms	Social worker
5.13	Provide counseling services to the client	Ongoing	Documented in case record	Social worker
5.14	Provide counseling to families of elderly clients who are experiencing problems in dealing with the client.	Ongoing	Documented in case record	Social worker
5.15	Arrange for the provision of crisis counseling and other crisis services.	Ongoing as needed	Procedure for crisis services established. Documented in case record.	Social worker
5.16	Perform as an advocate for the client to community agencies, institutions and individuals when appropriate and needed.	Ongoing as needed	Documented in case record	Social worker
5.17	Provide for ongoing case management and monitoring, reassessment, according to established and approved procedures.	Ongoing every 3 months.	Procedures established Documented in case record and AAA CTS forms	Social worker
5.18	Arrange for ongoing maintenance services such as, telephone reassurance, friendly visiting, shopping, from District Center when appropriate and needed.	Ongoing	Documented in case record AAA CTS forms	Social worker
5.19	Arrange for consultation and client evaluation (if indicated) from staff registered nurse.	As indicated	Documented in case record	Social worker
5.20	Provide written evaluation and recommendation from nurse.	Upon evaluation	Evaluation and recommendations written and in case record.	Nurse

4. Statement of Activities/Timelines/Staff Assigned for Each Objective: (List 80-81 as many activities as necessary to outline the work product.)

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elderly individuals with complex social/emotional/physical problems by accepting referrals from AAA District Center and other sources as approved by AAA and by providing 4,104 hours of case management III services to 108 different individuals who meet established need criteria with an average of 81 individuals receiving service each month during FY 1980-81

No.	Activity	Completion Date	Measure of Activity Completion	Staff Assigned
5.21	Arrange through linkage with a local hospital, provisions for inpatient psychiatric and physical assessments of clients and provide service as needed.	8-31-80	Linkage made, agreement written	Case Management Supervisor
5.22	Development of a system through which referrals can be made to the Office of Public Guardian and arrange for ongoing coordination and cooperation with that office.	7-31-80	Written procedures on file	Case Management Supervisor
5.23	Arrange for the provision of Guardianship and Conservatorship, public or private, when need indicates.	Ongoing as needed	Documented in case record and AAA CTS forms	Social worker
5.24	Develop process for placement with area nursing homes for the purpose of facilitating referrals and assisting in transition of clients needing such care either on a permanent or temporary basis.	8-31-80	Process developed for placement	Case Management Supervisor
5.25	Arrange and assist clients' families in the arrangement of nursing home care for clients needing such care.	Ongoing as needed	Documented in case record and AAA CTS form	Social worker
5.26	Development of a program of regular psychiatric and social work case consultation to case management team in order to assist in initial and ongoing assessment and understanding of clients psychiatric problems	7-31-80	Program developed and on file in Division Annual Plan	Case Management Supervisor
5.27	Development of a program of regular medical consultation to assist in the understanding of client medical problems.	7-31-80	Program developed and on file in Division Annual Plan. Consultation held.	Case Management Supervisor

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4. Statement of Activities/Timelines/Staff Assigned for Each Objective: (List as many activities as necessary to outline the work product.) MFS 80-81

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elderly individuals with complex social/emotional/physical problems by accepting referrals from AAA District Centers and other sources as approved by AAA and by providing 4,104 hours of case management III services to 108 different individuals who meet established need criteria with an average of 81 individuals receiving service each month during FY 1980-81

No.	Activity	Completion Date	Measure of Activity Completion	Staff Assigned
5.28	Develop a plan of temporary in-home medical service for clients who need such service by a physician and who have no physician or whose physician is unavailable for in-home service.	7-31-80	Plan developed and written procedures established	Case Management Supervisor
5.29	Development of a program of regular legal consultation to assist in the understanding of client legal problems.	7-31-80 4 times/annual	Program developed and on file in Division Annual Plan Consultation held.	Case Management Supervisor
5.30	Develop communication and coordination systems with other agencies providing service to clients in order to assure information needed for reassessment and/or modification of case plan.	7-31-80	Communication and coordination system developed	Case Management Supervisor
5.31	In cooperation with each referral source, establish the need for consultation in working with potential Case Management III clients (protective service).	9-1-80	Need established	Case Management Supervisor Social work consultant
5.32	Develop a plan in cooperation with referral source for the provision of consultation in working with potential Case Management III clients.	10-1-80	Plan established	Case Management Supervisor Social work consultant
5.33	Carry out consultation program with referral source on working with potential Case Management III clients.	Ongoing	Consultation provided and documented.	Case Management Supervisor Social work consultant
5.34	Arrange for the coordinator of services with those of Adult and Family Services protective service unit to assure that AFS assumes appropriate responsibility for cases that come under their jurisdiction.	9-1-80 Ongoing	Procedures established	Case Management Supervisor
5.35	Refer cases to AFS when indicated	When needed	Referrals made	Social worker

4. Statement of Activities/Timelines/Staff Assigned for Each Objective: (List as many activities as necessary to outline the work product.)  
 NFS 80-81

19829

5. Strategy/Method: (Briefly describe the general approach to meeting the stated goals and objectives. Discuss the rationale of this approach and how it relates to the overall strategy of the responsible HRB Divisional Unit).

In accordance with, and in support of the comprehensive plans of the Area Agency on Aging for the provision of services to the elderly, Metropolitan Family Service will provide a homemaker/housekeeper service on three levels and case management III service for clients needing immediate comprehensive social casework. Housekeeper service will be provided to those eligible elderly who are in need of basic maintenance housekeeping chores. 10% of the service will be reserved for those who need temporary service only (3 months or less). Homemaker I service provides service for those who need basic housekeeping plus the addition of personal grooming assistance and light cooking. Prime responsibility for case management will be with the District Centers for Housekeeper and Homemaker I cases. Homemaker II services will be for those clients who are in need of social casework services as well as the services of a homemaker for housekeeping, extensive or complicated personal care and cooking, and emotional support. Prime responsibility for this service will be with Metropolitan Family Service.

10% of the Level I and Level II Homemaker hours will be reserved for short term (3 months or less service). Referrals for Housekeeper/Homemaker service will be provided from the AAA District Centers. MFS will provide assessment, coordination and case monitoring and management for these clients by trained homemakers/housekeepers and professional social workers. Provision has been made for the movement of clients between Levels of service to assure the correct needs of the client. Coordination and cooperation between AAA District Centers, the community and MFS is assured by established procedures calling for frequent staffings and agency contact. Procedures for periodic assessment of clients is assured by established procedures. A referral process for services not contracted for from MFS will be established to the District Centers and community to provide client with full range of services. Referrals for Case Management III (Geriatric Protective Services) will be accepted by MFS from AAA District Centers, hospitals, public health nurses, family and the court system. The clients will receive a complete comprehensive assessment as to their physical, emotional and social status and needs. Service will be provided by a social casework team to include a worker with a Master's Degree in Social Work. This team will be responsible for ongoing case management. The team will be supported by an established support system which includes facilities or physical and mental inpatient evaluation, psychiatric, medical, legal consultation, and working agreements with hospitals, nursing homes, courts, Office of Public Guardian, volunteers and others needed in the provision of service. Procedures are established for cooperation and coordination with District Centers, community and MFS. Prime responsibility for the client will be held by MFS on all Case Management III cases. When Case Management III services are no longer required, procedures have been established for transfer of the case to District Centers or other community agencies.

The general strategy of this contract will be to share with the City of Portland in providing to the elderly of the city a program of in-home services that will complement the coordinated District Center system of the AAA by the provision of integrated, coordinated, quality in-home service program by Metropolitan Family Service. Besides the contracted for service above, Metropolitan Family Service will provide, when appropriate, additional volunteer service to include transportation (for those inappropriate for special transportation) escort services, friendly visiting and telephone reassurance for those clients for which we have case responsibility and for which District Center service is unavailable or inappropriate. These services will be integrated as part of the case service plan. In 79/80 3,711 hours of volunteer service equal to \$11,503 was provided to the contract. We anticipate providing an approximately equal amount in 80/81.

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6. Service Area, Target Population and Eligibility Criteria for Services:  
(Describe the service area to be covered by this project and the target population for each service to be provided. Explain how each target population will be identified. State the eligibility criteria to be utilized for each service provided and the method for appeal or exception.)

Service Area: service under this contract will be provided in Multnomah County on a County-wide basis.

Target Population

Homemaker/Housekeeper: those eligible frail persons who need this service as part of a case plan to enable them to remain in their own homes rather than go into nursing homes or other care facilities. These persons may need this service on a long term or short term basis.

Case Management III: those eligible frail persons who appear to be or are in danger of neglect, exploitation and who may not be able to act in their own best interest and can benefit from immediate comprehensive social case work and social services.

Eligibility Criteria: those frail persons 60 years or more of age who are in need of the contracted services to sustain independent living; who are not eligible for the same service from another agency legally responsible for its provision; who do not have friends or relatives able and willing to provide the service and who do not exceed the income level established by OPI and Area Agency on Aging guidelines. Any exceptions must have the approval of the Area Agency on Aging.

7. Organization: (Briefly describe the staffing pattern, selection procedures and administrative procedures.)

Geriatric Services providing Case Management III services is staffed by one Advanced (MSW) Social Work Supervisor, 1/3 Intake Worker, three Advanced (MSW) Social Workers and one (BA) Social Worker. Staff to be used in providing Case Management III services under this contract are a .75 Advanced Social Worker Supervisor, 3 Advanced Social Worker and .33 FTE Intake Worker. Part time paid and volunteer consultation is provided in the fields of psychiatric, legal, medical, and occupational therapy.

Homemaker Services providing Housekeeper, Homemaker I and Homemaker II service is staffed by an Advanced (MSW) Social Work Supervisor, an Advanced (Master's Ed. in Counseling Psychology) Homemaker Supervisor, 1/3 Intake Worker, a Homemaker Scheduler/Coordinator, and three (BA) Social Workers; one Registered Nurse and approximately 35 FTE Homemakers. Staff to be used on this contract are .70 Advanced Social Worker Supervisor, 1 Homemaker Supervisor, .33 Intake Worker, .60 Homemaker Scheduler/Coordinator, 3 Social Workers, 1 Registered Nurse, and .22 FTE Homemakers. Paid and voluntary consultation are provided in the fields of social work and occupational therapy.

The Intake Worker for both services is responsible for receiving the request for service, determining eligibility and need, accepting case, soliciting intake from referral sources in compliance with AAA allocation system.

The Service Coordinator of the Homemaker Division is responsible for the scheduling of all homemaker/housekeeper activities including substitution to clients, conferences, staffings and training, and for arranging client rides.

Social workers are responsible for client assessment, case planning, management monitoring, recording, coordination of services with collaterals and other agencies and provision of all social services.

Staff supervision consists of periodic and regular conferences between Supervisors and social workers (weekly). The Supervisors meet with agency's Associate Directors on a periodic basis to coordinate service and management. Homemaker/Housekeeper supervision is provided by Homemaker Supervisor and social work staff in regularly scheduled individual and group conferences.

All employees receive on the job training through close supervisory contact. Training is also provided to social work staff through regularly scheduled consultation in the fields of psychiatry, law, medicine, public guardian, social work, and through participation in training seminars and workshops developed for the entire agency and for their service specifically and in specialized training offered by AAA, other agencies and institutes. Staff also have funds available to take courses offered by educational institutions.

Staff are selected and hired in accordance with agency equal opportunity policies, by the Executive Director, Personnel Officer in consultation with the Service Supervisor. Recruitment is done throughout the service area using a wide variety of recruitment methods.

All staff receive eight (8) holidays (Christmas, New Years, Labor Day, Memorial Day, 4th of July, Thanksgiving and two (2) days Winter Leave).

All staff used on this contract are or will be in place by 6-31-80.

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8. Applicant Agency Administration: (Describe the qualifications of the incorporated agency, including experience, support services to be provided for this project and other related projects operated by the agency. Describe the functions of the Board of Directors as they relate to this project.)

Metropolitan Family Service has been providing social services to the elderly for many years. The agency pioneered the development of homemaker services in this community and has been providing these services to an elderly target population almost continuously since 1962. From 1972-74 the agency offered these services through Project ABLE. The ABLE experience led directly to the current contract with the City which has been in effect since 1974. The agency has offered housekeeper service to the elderly since November 1977. During the last 16 years the agency has pioneered a number of service projects targeted on the elderly and has provided community leadership in the development of Protective Services for the elderly. The agency absorbed the staff of Multnomah County's Protective Services Division (two people) when that program lost its funding in 1974 and formed what is now called Geriatric Services Division with a staff of six.

Beside our current contract with the City of Portland, the agency also provides homemaker services under contract with the Childrens Services Division of the State of Oregon, counseling services under contract with the Mental Health Services of Washington County, counseling and consultation services with the Hillsboro Elementary School District, and a contract to provide counseling services to families who have experienced instances of domestic violence, from the Office of Public Safety, City of Portland. Through these contracts we have demonstrated that we have both the financial and program management capabilities to manage such contracts.

Homemaker Services and Geriatric Service (providing Case Management III services) receives administrative and programmatic support as program elements of the larger agency. Administrative support for resource development, fiscal management, contract development, contract reporting and program monitoring are provided by the Executive Director, Associate Director/Finance and Associate Director for Contract Management, bookkeeper and statistician. Clerical support is provided by a secretarial pool. Program support is provided by a Centralized Intake Unit which is responsible for the initial screening of all referrals as to their appropriateness and eligibility for Homemaker/Housekeeper services and Case Management III services. This Unit provides information to the community regarding the services offered and serves as an information and referral service for those services not provided by the agency. Further program support is provided by Volunteer Services. The Director of this service provides trained and supervised volunteers to augment the services of the social worker and homemaker. Typical services provided are Friendly Visiting, Telephone Reassurance, Escort and Transportation for such things as medical appointments and shopping and other services for which a volunteer is appropriate. Support is provided by the Counseling Service by its ability to offer services to clients and consultation to staff. As the AAA contract is one of a number of contracts for homemaker service, it receives additional program back-up from other homemakers and staff employed by the agency as part of Homemaker Services. Program support is also received by the agency's membership in the National Council for Homemaker Services and the Oregon Council of Homemaker Services. Geriatric Services receive back-up support from the agency's United Way Geriatric Service program.

8. Applicant Agency Administration (continued)

The Board of Directors, which has overall responsibility for establishing policies to guide agency services and operations, provide active liaison between the agency's programs and the broader community. The Board is elected from the community by the agency membership. The Board Nominating Committee actively seeks to assure that the Board is representative of the community as well as the population served by the agency.

Program information regarding Homemaker/Housekeeper Service and Geriatric Services (Case Management III) are provided to the Board through its Homemaker and Geriatric Service Board Committees.

The Board establishes policies which include areas of finance, personnel and program. As with all agency programs, the Board has final authority in all policy matters relating to agency participation in this contract. The Executive Director, as the Board's employee, is charged with carrying out its approved policies in administering agency program.

Metropolitan Family Service's long range plans include continuing to provide services to the elderly through contracts and through our United Way programs. Geriatric Services are currently being expanded to offer case management protective services to bank Trust Departments for the elderly clients they serve.



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9. Community Participation: (Describe the citizen involvement in planning this project, the methods and expectations for community involvement in the project's operation. Describe the functions of the Advisory Council as they relate to this project. Describe staff, Advisory Council and Corporate Board relationship.)

The Board of Directors of the agency, composed of a cross-section of citizens from the community, has established two committees which have particular importance for agency programs and services. The Board Planning Committee has responsibility for overseeing long range planning for the agency and periodically clarifying the agency's mission, goals and objectives. This Committee has recently completed a new agency goal structure which will facilitate the development of the agency annual plan.

The Board Program Evaluation and Review Committee has responsibility for reviewing the overall agency program and insuring that services are both relevant to the community and effective for clients. This Committee periodically completes a self-study of the agency for purposes of reaccreditation as a member of the Family Service Association of America.

The Homemaker Service and Geriatric Service are reviewed in this process as elements of the total agency program with particular emphasis on the role of these programs within the agency. Other Board committees of particular importance are the Geriatric Service and Homemaker Program Committees. The purpose of these Committees is to become full acquainted with the service provided by the Divisions, types of problems being presented, types of families requesting service, results of service provided and the program development needs of the service. Policy considerations for the Board in relation to the agency's program will come from these Committees.

A large and active agency Volunteer Program provides direct services to our elderly clients in the form of friendly visiting, telephone reassurance, transportation, shopping, escort and when appropriate, monitoring of stabilized cases.

Requests for these services are made by the case manager through the Volunteer Service Coordinator. Care is taken to place the most appropriate volunteer for the client's needs. Supervision of the volunteer is provided by the Volunteer Coordinator and the case manager. As stated earlier in this proposal, 3,711 hours of volunteer services were provided to this contract in 79/80 at a value of \$11,503. We anticipate providing the same approximate amount in 80/81 and 81/82.

The Board of Directors is the final authority on all policy matters of the agency. They are responsible for the hiring of the Executive Director who is responsible to them for the management of the agency. The staff of the agency are responsible through our supervisory structure to the Executive Director. The Board Program Committees are responsible to the Board

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10. Coordination: (Describe the intentions to coordinate this project with other community organizations and statutory agencies in the service area. Briefly discuss program and service exchanges that may occur. Identify staff positions responsible for these activities.)

The agency participates fully in AAA efforts to coordinate services to the elderly and to establish linkages between AAA service providers. The agency's Associate Director/Contract Manager attends all Area Agency on Aging's Advisory Board meetings and participates in AAA agency contractors' meetings which seek to provide and improve service understanding and coordination. Other agency staff attend these meetings as needed.

The Homemaker and Geriatric Service supervisors are responsible for maintaining the linkage between Metropolitan Family Service and the AAA referring District Center. This linkage is accomplished by periodic in-person and phone conferences, staffings and consultations. Case service information, referral information and case planning information are shared at these meetings. Social work staff of the agency consult frequently with Center counselors. As necessary to facilitate the assessment of clients' needs, coordination of service and the use of Homemaker/Housekeeper services (details of the proposed linkage processes are described in the activities of this proposal and in the attachments).

In addition to establishing linkages with AAA service provider, the agency coordinates service within by monthly meeting of Case Management III staff and Homemaker Staff to coordinate service provided to mutual clients. Coordination meetings are held regularly with Volunteer Services also. Every attempt is made to coordinate services with all other community agencies by in-person conferences and staffings as well as frequent phone contact.

In the interest of serving this contract and the elderly of the Portland area, the agency has working agreements with the following agencies:

Office of Public Guardian - mutual referral system, coordination re. mutual clients, monthly case staffings, procedures and joint planning for clients' well-being.

Woodland Park Mental Health Center - mutual referral system, responsibilities, procedures criteria and follow-up. This is for medical/psychiatric evaluations and client stabilization on emergency as well as non-emergency basis.

Probate Court - procedures for appointment of GSD social workers as court visitors in contested cases, close working relationship with Judge, referral system with Special Agent of Probate Court, District Attorney, etc.

House Calls, Inc. - referral system for home visits by doctors to GSD clients in specific situations such as medical emergencies and/or when client has no physician and/or refuses to go to a doctor's office or hospital.

Muck-Out Services - the literal shoveling-out messes in some GSD clients' homes to eliminate hazards of fire, vermin infestation, health, sanitation and safety. Done by MFS Janitorial Service.

Providence Hospital and Mental Health Centers - mutual referral system, responsibility procedures, criteria and follow-up. This is for medical/psychiatric evaluation and client stabilization on emergency as well as non-emergency basis.

Other - cooperative working relationships, referral procedures and coordination with a variety of other community services including Community Health Nurses, Hospital social workers, attorneys, doctors, banks, AFS, VA, Social Security, Police and Fire Departments.

**EXHIBIT B**  
**BUDGETS AND ATTACHMENTS**

FISCAL SECTION

1. Budget Summary

a. Funding Recap: (List all sources of funding by amount and source.)

<u>City Support Requested</u>	<u>Amount</u>
<u>Housekeeper</u>	<u>\$ 101,209</u>
<u>Homemaker I</u>	<u>81,533</u>
<u>Homemaker II</u>	<u>133,117</u>
<u>Case Management III</u>	<u>90,206</u>
<hr/>	
Subtotal	<u>406,065</u>
Required Cash Match	<u>79,265</u>
Program Income	<u>-0-</u>
Subtotal	<u>485,330</u>
<hr/>	
<u>Other Project Support</u>	
<u>1. Volunteer Time (3,711 hrs. @ 3.10)</u>	<u>11,504</u>
<u>2. United Way</u>	<u>3,855</u>
Subtotal	<u>15,359</u>
TOTAL	<u>500,689</u>

b. Funding Statement: (Briefly describe the duration of funding from each source listed above.)

1. Volunteer time is donated time from community residents recruited by Metropolitan Family Service to support individuals eligible for service from this contract.
2. United Way funds are allocated to this agency to administer for the benefit of the community and are a stable source of funds.

2. Statement of Certification

The information provided herein is, to the best of my knowledge, certifiable and correct.

Authorized Signature

*Ronald Ford*

Date 5/19/80

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ATTACHMENTS

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Attachments: (Required information is listed below. Forms, if necessary, are included in this section.)

1. Budget Justification Forms
  - Budget Worksheet
  - Personnel Justification (full-time staff)
  - Personnel Justification (part-time staff)
  - Materials and Services
  - Capital Outlay
2. Project Organization Chart
3. Job Descriptions/Qualifications
4. List of Current Board of Directors
5. List of Current Advisory Council Members
6. Applicant Resume
7. Assurance of Compliance with Section 504, Rehabilitation Act of 1973
8. Map of Service Area
9. Proposed procedures and forms for coordination of service
10. Homemaker In-Service Training 80/81
11. Budgeted Procedures for Implementing Activities - Subject to AAA Approval

DEPARTMENT OF SOCIAL SERVICES  
COMMUNITY CARE DIVISION  
COMMUNITY CARE SERVICES  
BUREAU OF BUDGET/SERVICES

SERVICE: In-Home Support Services

AGENCY: Metropolitan Family Service

CONTRACT PERIOD: 7/1/80 through 6/30/82

HOUSEKEEPER: 13,423 hours

BUDGET

\$ 101,209 \*

HOMEMAKER

LEVEL I: 9,615 hours \$ 81,533

LEVEL II: 14,283 hours 133,117

\$ 214,650 \*

CASE MANAGEMENT III

TOTAL PERSONS: 108 4,104 hours

MONTHLY CASELOADS: 81

\$ 90,206 \*

TOTAL CITY SUPPORT: \$ 406,065

MINIMUM REQUIRED MATCH: \$ 79,265

TOTAL \$ 485,330

ADMINISTRATION  
(MAXIMUM ALLOWED)  
\$ 40,606

\*Individual service component money amount to be proposed by Applicant Agency. Total may not exceed Total City Support.

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IN-HOME SUPPORT SERVICES  
METROPOLITAN FAMILY SERVICE

FY80/81

APPROPRIATION UNIT  
LINE ITEM WORKSHEETMFS  
80-81

Code	Object Title	OPI HOUSEKEEPER	OPI HOMEMAKER I	OPI HOMEMAKER II	OPI/ CASE MANAGEMENT III	OPI TOTAL CITY SUPPORT
110	Full-Time Employees					
120	Part-Time Employees					
130	Federal Program Enrollees					
140	Overtime					
150	Premium Pay					
170	Benefits					
190	Less-Labor Turnover					
100	<b>Total Personal Services</b>					
210	Professional Services					
220	Utilities					
230	Equipment Rental					
240	Repair & Maintenance					
260	Miscellaneous Services	101,209	81,533	133,117	90,206	406,065
310	Office Supplies					
320	Operating Supplies					
330	Repair & Maint. Supplies					
340	Minor Equipment & Tools					
350	Clothing & Uniforms					
380	Other Commodities--External					
410	Education					
420	Local Travel					
430	Out-of-Town Travel					
440	Space Rental					
450	Interest					
460	Refunds					
470	Retirement System Payments					
480	Miscellaneous					
510	Fleet Services					
520	Printing Services					
530	Distribution Services					
540	Electronic Services					
550	Data Processing Services					
560	Insurance					
570	Telephone Services					
580	Intra-Fund Services					
590	Other Services--Internal					
200- 500	<b>Total Materials &amp; Services</b>	101,209	81,533	133,117	90,206	406,065
610	Land					
620	Buildings					
630	Improvements					
640	Furniture & Equipment					
600	<b>Total Capital Outlay</b>					
700	Other					
	<b>TOTAL</b>	<b>\$101,209</b>	<b>\$81,533</b>	<b>\$133,117</b>	<b>\$90,206</b>	<b>\$406,065</b>

IN-HOME SUPPORT SERVICES  
METROPOLITAN FAMILY SERVICE  
FY 80/81

APPROPRIATION UNIT  
LINE ITEM WORKSHEET

Code	Object Title	TOTAL REQUIRED MATCH	PROJECT INCOME	TOTAL CONTRACT AMOUNT	OTHER RESOURCES	TOTAL PROJECT
110	Full-Time Employees					
120	Part-Time Employees					
130	Federal Program Enrollees					
140	Overtime					
150	Premium Pay					
170	Benefits					
190	Less-Labor Turnover					
100	Total Personal Services					
210	Professional Services				15,359	15,359
220	Utilities					
230	Equipment Rental					
240	Repair & Maintenance					
260	Miscellaneous Services	79,265		485,330		485,330
310	Office Supplies					
320	Operating Supplies					
330	Repair & Maint. Supplies					
340	Minor Equipment & Tools					
350	Clothing & Uniforms					
380	Other Commodities-External					
410	Education					
420	Local Travel					
430	Out-of-Town Travel					
440	Space Rental					
450	Interest					
460	Refunds					
470	Retirement System Payments					
480	Miscellaneous					
510	Fleet Services					
520	Printing Services					
530	Distribution Services					
540	Electronic Services					
550	Data Processing Services					
560	Insurance					
570	Telephone Services					
580	Intra-Fund Services					
580	Other Services-Internal					
200-500	Total Materials & Services	79,265		485,330	15,359	500,689
610	Land					
620	Buildings					
630	Improvements					
640	Furniture & Equipment					
600	Total Capital Outlay					
700	Other					
	<b>TOTAL</b>	<b>79,265</b>		<b>485,330</b>	<b>15,359</b>	<b>500,689</b>



## METROPOLITAN FAMILY SERVICE

## BUDGET JUSTIFICATION

## MATERIALS AND SERVICES

## OTHER RESOURCES

DATE 5/19/80

PROJECT NO. \_\_\_\_\_

PROJECT TITLE In-Home Support Services /Metropolitan Family Service

## OTHER RESOURCES

To extent possible, use format indicated below.

CODE	DESCRIPTION OF ITEM AND BASIS FOR VALUATION	ITEM TOTAL	CATEGORY TOTAL
210	PROFESSIONAL SERVICES		
	Volunteer Time		
	3,711 hrs. @ \$3.10/hr. (Min. Wage)	\$11,504	
	Occupational Therapist		
	150 hrs. @ \$22.50/hr.	3,375	
	Psychiatric Consultation		
	12 hrs. @ \$40/hr.	480	\$ 15,359

BUDGET JUSTIFICATION  
MATERIALS AND SERVICES

DATE 6/11/80

PROJECT NO. \_\_\_\_\_

PROJECT TITLE In-Home Support Services/Metropolitan Family Service

TOTAL PROJECT

To extent possible, use format indicated below.

CODE	DESCRIPTION OF ITEM AND BASIS FOR VALUATION	ITEM TOTAL	CATEGORY TOTAL
210	Volunteers 3,711 hrs. @ \$3.10/hr.	11,504	
	Occupational Therapist 150 hrs. @ \$22.50/hr.	3,375	
	Psychiatric Consultation 12 hrs. @ \$40/hr.	480	15,359
260	Housekeeper Services 13,423 hours @ \$9.276/hr.	124,517	
	Homemaker I Services 9615 hours @ \$10.49/hr.	100,875	
	Homemaker II Services 14,285 hours @ \$10.45/hr.	149,280	
	Case Management III Services 4104 hrs. @ 26.96/hr.	110658	485,330







BUDGET JUSTIFICATION  
MATERIALS AND SERVICES

DATE 6/11/80

PROJECT NO. \_\_\_\_\_

PROJECT TITLE In-Home Support Services/ Metropolitan Family Service

Case Management III

OPI

To extent possible, use format indicated below.

CODE	DESCRIPTION OF ITEM AND BASIS FOR VALUATION	ITEM TOTAL	CATEGORY TOTAL
260	3,346 hours of case management III services @ \$26.96/hr.  <div style="display: flex; justify-content: flex-end; align-items: flex-end;"> <div style="display: flex; flex-direction: column; gap: 5px;"> <div style="display: flex; align-items: center;"> <span>services</span> <span style="margin-left: 20px;">93%</span> <span style="margin-left: 20px;">\$25.073/hr</span> </div> <div style="display: flex; align-items: center;"> <span>admin.</span> <span style="margin-left: 20px;">7%</span> <span style="margin-left: 20px;">1.887/hr</span> </div> <div style="border-top: 1px solid black; width: 100px; margin-left: 100px;"> <span>\$26.96 /hr</span> </div> </div> </div>		

BUDGET JUSTIFICATION  
MATERIALS AND SERVICESDATE 6/11/80

PROJECT NO. \_\_\_\_\_

PROJECT TITLE In-Home Support Services/ Metropolitan Family Service

## TOTAL CITY SUPPORT

To extent possible, use format indicated below.

CODE	DESCRIPTION OF ITEM AND BASIS FOR VALUATION	ITEM TOTAL	CATEGORY TOTAL
260	10,910 hours of housekeeper services @ \$9.276/hr.  services 93% \$8.627/hr. admin. 7% .649/hr. <u>\$9.276/hr.</u>	101,910	
	7,772.5 hours of homemaker I services @ \$10.49/hr.  services 93% \$9.756/hr. admin. 7% .734/hr. <u>\$10.49/hr.</u>	81,533	
	12,738 hours of homemaker II services @ \$10.45/hr.  services 93% \$ 9.719/hr. admin. 7% .731/hr. <u>\$10.45 /hr.</u>	133,117	
	3,346 hours of Case Management III services @ \$26.96/hr.  services 93% \$25.073/hr. admin. 7% 1.887/hr. <u>\$26.96/hr.</u>	90,206	
			406,065

BUDGET JUSTIFICATION  
MATERIALS AND SERVICESDATE 6/11/80

PROJECT NO. \_\_\_\_\_

PROJECT TITLE In-H me Support Services/Metropolitan Family Service

Total Required Match

To extent possible, use format indicated below.

CODE	DESCRIPTION OF ITEM AND BASIS FOR VALUATION	ITEM TOTAL	CATEGORY TOTAL
260	Housekeeper Services 2,513 hours @ \$9.276/hr.	23,308	
	Homemaker I Services 1,842.5 hours @ \$10.49/hr.	19,342	
	Homemaker II Services 1,547 hours @ \$10.45/hr.	16,163	
	Case Management III Services 758 hours @ \$26.96/hr.	20,452	
			\$79,265



BUDGET JUSTIFICATION  
MATERIALS AND SERVICESDATE 6/11/80

PROJECT NO. \_\_\_\_\_

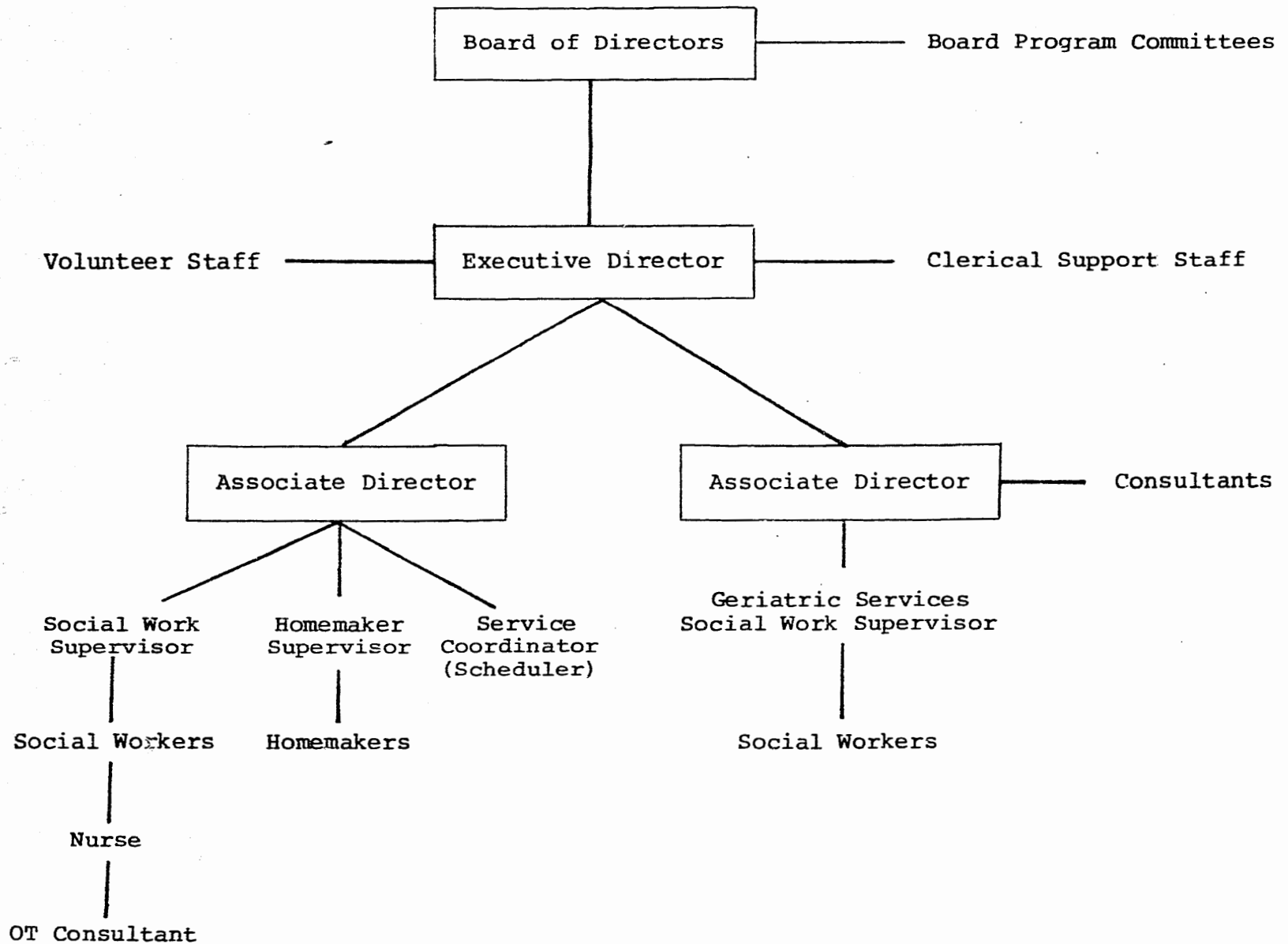
PROJECT TITLE In-Home Support Services/Metropolitan Family Service

TOTAL CONTRACT AMOUNT

To extent possible, use format indicated below.

CODE	DESCRIPTION OF ITEM AND BASIS FOR VALUATION	ITEM TOTAL	CATEGORY TOTAL
260	Housekeeper Services 13,423 hours @ \$9.276/hr.	124,517	
	Homemaker I Services 9615 hours @ \$10.49/hr.	100,875	
	Homemaker II Services 14,285 hours @ \$10.45/hr.	149,280	
	Case Management II Services 4104 hrs. @ \$26.96/hr.	110,658	
			485,330

PROJECT ORGANIZATIONAL CHART



B-15

Position Description: Social Work Supervisor

The Social Work Supervisor carries responsibility for duties relating to: coordination of social services, for staff supervision and evaluation, for participation in the hiring of staff and for coordinating and interpretation of specific social services in the community. Supervisors are responsible to the designated Associate Director of the agency, but can consult with other Associate Director or Executive Director when appropriate.

I. Social Service Management

Planning: Develop with each worker a plan for that worker's job objectives and staff development. Cooperate with the administration of the agency in developing the agency's annual plan.

Personnel Policies: Assure that the staff under your supervision know and understand personnel policies. Coordinate vacation and other leaves so as to assure adequate social work coverage.

Employment of Staff: Participate with Executive Director and Personnel Officer in the hiring of new staff. Orientate new staff to the work of the particular service.

Service Objectives: Use the monthly service reports to identify problems and to assist staff in meeting their service objectives.

Information System: Assure a thorough orientation and understanding of all data collection forms.

II. Coordination Function

- facilitate social service coordination between service units;
- facilitate work between social service staff members within the unit to assure good continuous service to clients;
- serve as the link between social service staff and administrative staff;
- facilitate communication from administration to social service staff;
- interpret units social services to supervisory, and direct service staff of other agencies who serve the same family.

III. Quality Assurance Function

- Supervision: Provide supervision on a planned basis to social service staff.
- Practice Methods: Define and interpret for the social service staff the service functions that contribute to quality practice.

- Evaluations: Assure that each member of the social service staff has an annual performance evaluation.
- Program Review: Provide an annual review of the social service staff's services in light of the annual plan.
- Staff Training and Development: With staff members plan staff development programs for each year.

#### IV. Community Responsibilities

- Consultation: Be available as time permits to offer consultation and training to other community agencies and organizations.

Social Worker  
Job Description

MFS  
80-81

SECTION I: WORK ELEMENTS FOR REVIEW

- A. Describe the major element of this staff member's job in order of importance.

There are five major elements. While they are somewhat in order of importance, there is in reality very little difference in importance between elements, and each worker is expected to be able to cover all elements:

1. Direct service to clients.
2. Supervision of Homemakers.
3. Record keeping.
4. Supervision received.
5. General Agency responsibilities.

- B. Describe the level of work performance for each element.

1. Direct Service to Clients.

- A. Interviewing clients: the worker is expected to be able to use the interview as a means of obtaining general information necessary to determine how the worker and agency program may be helpful to the clients, to explain services, and to develop a feeling of trust for the worker and the agency in the client.
- B. Evaluation of Client Needs: 1. The worker is expected to be able to assess the situational needs of the client and to determine which needs can be realistically met. 2. The worker is expected to be able to observe the emotional state of the client and with supervisory help be able to use the information gained from those observations in planning for the client.
- C. Working with other agencies: the worker is expected to be able to maintain a working relationship with other agency workers, to be able to present clients' needs to appropriate agencies, and to coordinate services to the client with involved agencies.
- D. Counseling with clients: The worker is expected to work with the client in helping the client in situational problem solving. They are expected to observe the client's general feelings and to take these and agency policy into consideration when helping the client find solutions.
- E. Case management: the worker is expected to be able to make a plan for his work with the client and to carry out those plans in a flexible manner.

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2. Supervision of Homemakers.

A. Conferences: The worker is expected to hold regularly scheduled conferences with the homemaker. Other conferences are expected to be held when indicated. Conferences should be used to cover areas:

1. to help homemaker understand her job;
2. to help homemaker understand client needs;
3. to solve problems arising from the job;
4. to give support to homemaker and to help her learn new techniques;
5. to interpret division and agency rules.

B. The worker is expected to personally introduce each homemaker to a new client at the client's home, and to interpret the service to the client and the client's needs to the homemaker.

C. Periodic group supervision meetings with homemakers may be held for the same purpose as individual conferences, but in a group setting.

D. Training sessions for homemakers: the worker is expected to attend and take part in such sessions when requested.

E. Scheduling: the worker is expected to maintain schedule of homemaker service to clients in the manner determined by the division.

## 3. Record keeping.

A. Case dictation: worker is expected to keep descriptive records current, according to division rules.

B. Records are expected to be clearly written and contain required information.

C. General forms: worker is expected to learn how to use the various forms required and to keep their use up to date and accurate.

## 4. Supervision Received.

A. The worker is expected to take part in weekly supervision conferences with his immediate supervisor. The worker is expected to be on time and to come prepared to discuss his work.

B. The worker is expected to use supervision as a means of receiving assistance and support in planning for the worker's clients.

C. The worker is expected to be able to give a general review of his observations about the client being discussed and the services being provided, and his work with that client.

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- D. The worker should expect support from the supervisor in terms of specific advice and general information of use to the worker in handling his clients.
  - E. The worker is expected to attend all division staff meetings and to participate in them as requested.

5. General Agency Responsibilities.

- A. The worker is expected to attend all agency staff meetings
- B. The worker is expected to maintain positive professional attitude towards the agency and his work.

## METROPOLITAN FAMILY SERVICE

Position Description  
Service CoordinatorI. Major Elements of Job (In order of importance)

- A. The coordination of homemaker service to the client through the accurate maintenance of homemaker schedules.
- B. Act as a liaison between various elements of homemaker service and social workers, clients, and agencies in the community by the receiving of information and messages and accurately distributing them to the appropriate persons.
- C. The maintenance of homemaker division files.  
Preparing necessary records and reports.
- D. Assist in the hiring and orientation of homemakers.
- E. General Division and agency responsibilities.

II. Duties and Required Level of Work Performance for Elements of Job

- A. The Service Coordinator is expected to carry out all job responsibilities in an accurate, sensitive and timely manner. The worker will need to have their work well organized and to be able to keep track of many details and to handle consistent interruptions without loss of accuracy. The worker will have to be able to handle on the phone clients who may be upset and demanding and to handle complaints from clients and



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the community in a manner that leaves the client or complainant reassured and confident that the matter will be looked into.

The worker will have to demonstrate good judgment in when to request assistance from supervisors or social work staff. The worker will need to be able to take messages that accurately reflect the concern of the caller.

The worker will need to be able to work under supervision and to work cooperatively with all division staff. Must be able to do accurate personal typing.

Expected Duties are as Follows:

A. Coordinator of Homemaker Service

1. Keep an accurate, up-to-date schedule of all Homemaker assignments, including homemaker assignments, conferences, training and all else that effect the schedule.
2. Make all changes in schedules accurately with change and reason so that time sheets can be reconciled to schedule.
3. Type and mail homemaker schedules weekly.
4. Notify clients of changes in schedule by phone.
5. Notify social worker of schedule change by written message.
6. Notify senior centers of major schedule changes by phone.
7. Arrange for substitute of homemakers when necessary, keeping in mind special circumstance of client.

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8. Accept calls from clients in regard to scheduling matters.
  9. In coordination with the Homemaker Supervisor do periodic check on homemaker performance.
- B. Liaison between various elements of homemaker service and the community.
1. Accept messages and comments for Homemaker staff who are not available in a manner that accurately reflects the concerns of the caller.
  2. Accurately schedule requests for Tri-Met Lift rides by phone or written request, notify client and/or social worker.
  3. Refer to Homemaker Supervisor requests for vacations, sick leave, emergency leave by homemakers.
  4. Notify Homemaker supervisor of any reported problems with homemaker performance.
  5. Accurately record all comments regarding service on comment form and distribute appropriately.
- C. Maintenance of Homemaker Files and Reports.
1. Keep accurate record of Homemaker training attendance and enter in personnel file.
  2. Maintain personnel files of homemakers.
  3. Keep records of intake, closings and year to date figures for clients served in Homemaker Division.
  4. Maintain division supplies of needed forms.
  5. General responsibility for maintaining division files.
  6. Other reports and records as may be requested.
  7. Send out accident claim forms.
  8. Maintain up to date and accurate roladex file

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- D. Assist in hiring and orientation of Homemakers.
1. Schedule homemaker interviews with Homemaker Supervisor.
  2. Type letters of employment.
  3. Assist in orientation of new Homemakers.
  4. Maintain new employee information packets.
- E. General Division and Agency
1. The service coordinator will work under the supervision of the Homemaker Supervisor and will be expected to accept supervision and to use it appropriately both for learning and guidance.
  2. Attend all Homemaker Division staff meetings.
  3. Attend training sessions as requested.
  4. Set up for homemaker training.
  5. Attend all agency staff meetings.
  6. Other miscellaneous duties as requested.

MEH/nd

## HOMEMAKER JOB DESCRIPTION

General Statement of Service

Homemaker/Housekeeper Service provides practical in-the-home help to strengthen and maintain families and individuals whose stability is threatened by illness, social maladjustment, or other problems. This help is provided by the social worker who plans with the family how best to meet the family's needs and by the homemaker who with the training and supervision provided by the agency, assumes full or partial responsibility for care of older adults and for household management.

Job Qualification and Task Requirements of Class I Homemakers (Housekeepers)Flexibility:

1. Must be willing and able to travel to any part of the city for assignment.
2. Will accept assignments in homes of older adults.
3. Must be willing to work in homes of persons of any race or national origin, religion.
4. Must have the skills necessary to perform the full range of ordinary household tasks.
5. Must not possess allergies to common household chemicals, cleaning supplies and common household pets.

Sensitivity to Clients:

The homemaker must:

1. demonstrate a willingness to accept the clients as they are;
2. recognize the value of the client's independence;
3. be willing to learn how to work effectively with clients of differing personalities;
4. be willing to learn to recognize the interaction between illness, age and personality.

## Position Description

Homemaker Supervisor

Homemaker Supervisor must be able to work with persons of varying backgrounds and skills. Must be able to delegate work and supervise staff effectively. Must be able to make decisions and be consistent in treatment of staff. Must be sensitive to the feelings of clients and workers. Must be able to provide in-home social service to a case load of elderly clients.

## I. Major Elements of Job

- A. Supervision of Homemakers including hiring and termination.
- B. Homemaker training.
- C. Supervision of Service Coordinator.
- D. In-home social service to a partial case load of elderly Homemaker clients.
- E. General division and agency responsibility.

## II. Duties and Level of Work Performance for each Element

- A. Supervision of Homemakers - Responsible for Hiring and Termination
  1. Must be able to correctly assess qualifications of persons applying for Homemaker position and determine appropriateness for hiring.
  2. Must be able to correctly evaluate performance of Homemaker and when necessary terminate homemakers following correct termination procedure.

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B. Supervision

1. Must be able to effectively work with Homemakers of varied backgrounds and skill level.
2. Must show consistency in handling of staff and problems.
3. Must be able to help Homemakers use their skills effectively.
4. Must be able to interpret clearly to the employee their responsibilities and duties.
5. Must be able to accurately evaluate the performance of the homemaker and to give this evaluation to the worker in a positive manner.
6. Must provide accurate and clear written employee evaluation yearly.
7. Is responsible for the approval and scheduling of Homemaker vacations so as to provide for adequate staff coverage.
8. Responsible for approval of emergency leave, sick leave and winter leave.
9. Must be able to work effectively with other professional staff in solving problems and in working effectively with homemakers.

## C. Homemaker Training

1. Responsible for developing an annual training program for Homemaker.
  - a. Must be able to assess individual and collective training needs of homemakers.
  - b. Is responsible for arranging training to meet homemaker needs and to satisfy requirements of National Homemaker Requirements.

2. Responsible for orientation of new Homemakers to the agency and job responsibilities.
- D. Supervision of Service Coordinator
1. Provide weekly supervision to Service Coordinator in performance for duties.
  2. Accurately evaluate performance of Service Coordinator.
  3. Clearly interpret Service Coordinator's duties and responsibilities.
- E. In-home Social Service to Partial Caseload of elderly Homemaker Clients
1. Homemaker supervision is expected to carry a partial case load of homemaker clients who are in need of intensive social work service.
  2. Is expected to fulfill the record and casework expectations as outlined in the Social Worker Job Description.
- F. General Division and Agency Responsibility
1. Arrange for Homemaker and Social Worker conferences regarding clients.
  2. Be familiar with Service Coordinator's job and be able to handle that position when the Service Coordinator is absent for an extended time.
  3. Attend all Homemaker Staff meetings.
  4. Attend all general staff meetings.
  5. Responsible for conducting all Homemaker meetings.

Supervision:

The homemaker must:

1. be able to work cooperatively as a team member with others; social workers, supervisors, other homemakers;
2. be able to take appropriate suggestions from supervisor and to put these suggestions into practice;
3. be able to express to the supervisor concerns and problems regarding the client's situation;
4. be able to discuss both positive and negative aspects of job performance;
5. arrive for scheduled conferences on time.

Reporting and Attendance:

The homemaker must:

1. follow all rules in regard to reporting of time and filling out schedules;
2. be able to furnish written reports on request;
3. be able to keep an accurate time sheet;
4. turn in all reports to office when due;
5. report all changes in client condition promptly to the social worker;
6. report all problems on the job promptly to the appropriate person within the agency;
7. be on time for assignments;
8. not end assignment at client's home other than at scheduled time without permission, or in case of emergency, following prescribed procedure;
9. wear uniform on all agency business;
10. not have excessive absenteeism that creates continuing problems in giving service to clients.

Training:

The homemaker must:

1. attend all training sessions that she is requested to attend;
2. be on time for training;
3. participate actively in training sessions and when asked, show competence in subject for which training was given.



Tasks:

The homemaker is responsible for performing the following tasks of home management:

1. Laundry: In client's home when possible or at a laundromat when necessary. This may require going to laundromat by bus and carrying at maximum two full loads of laundry.
2. Ironing
3. Mending
4. General light housework, including mopping floors, and vacuuming
5. Cleaning ovens
6. Cleaning refrigerators
7. Shopping for groceries (carrying up to 20 pounds in weight)  
Shopping for groceries by bus (one large bag)
8. Preparing light meals
9. Cleaning bathroom
10. Cleaning kitchen
11. Stand-by bath assistance
12. Light, yard, porch and walk clean-up.

Job Qualifications and Task Requirements of Class II Homemakers

The Class II Homemaker must show competence in all areas of Class I Job Qualifications and Task Requirements, as well as the following:

Personal Care:

The homemaker must:

1. be able to properly assist clients in taking a bed bath;
2. be able to properly assist clients in and out of the tub when assigned to do so;
3. be able to assist client with shampooing hair in and out of bed;
4. be able to clean dentures;
5. be able, when assigned, to properly help clients with ambulation;
6. be able, when assigned, to properly help clients with transfers from bed to wheelchair, from wheelchair to commode seat;

- be able to change a bed with a person in it;
8. be able to work effectively with mentally ill or confused adults.

Food Buying and Preparation:

The homemaker must:

1. be able to prepare nutritionally balanced meals;
2. be able to prepare food that can be stored for later use by the client, such as frozen dinners;
3. be able to prepare special diets;
4. be able to plan meals and purchase food within the family budget.

Sensitivity to Clients:

The homemaker must:

1. be able to work with clients who are critical and unappreciative or unpleasant without showing anger or irritability;
2. be able to maintain a cheerful positive attitude toward the client;
3. be able to recognize unusual or sudden changes in client's mood or behavior and promptly report these to the social worker;
4. be able to recognize the value of maximizing client independence and be able to work with the client to accomplish this.

Family and Child Care:

The homemaker must:

1. be able to provide proper supervision and care for children of all ages;
2. be able to manage household where children are present;
3. be able to respond to children in a friendly, supportive and caring manner;
4. be able to recognize changes in children and family functioning and report this to social worker;
5. be able to work cooperatively with family members;
6. be able to provide non-nursing care of the sick child at home.

Supervision and Staffing:

The homemaker must:

1. attend all requested staffings;
2. be able to work cooperatively as a team member with social work staff of other agencies;
3. follow proper procedures for reporting case information to involved agencies.

Job Qualifications and Task Requirements of Class III Homemakers

The Class III homemakers must show competence in all areas of Class I and II Job Qualifications and Task Requirements, as well as the following:

Flexibility:

The homemaker must:

1. have demonstrated a high degree of ability to work with a wide variety of clients including families with children of all ages as well as older persons;
2. have demonstrated an ability to work with a wide range of family problems;
3. have demonstrated an ability to work with persons of very difficult personalities and dispositions;
4. have demonstrated an ability to work with different social workers, agencies and other professionals;
5. have demonstrated an ability to work with families with severe adjustment and child behavior problems due to mental or physical illness.

Sensitivity to Clients:

The homemaker must:

1. demonstrate an awareness of the emotional problems of clients and under the direction of professional staff be able to work effectively with these problems;
2. demonstrate an understanding of a healthy parent-child relationship and be able to use this knowledge in working with families.

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Teaching:

The homemaker must be able to effectively demonstrate, model and teach the following:

1. Care and maintenance of the home
2. Personal hygiene
3. Child care
4. Basic budgeting
5. Meal planning and preparation

6/29/78jd

Geriatric Services DivisionJob Description  
for  
Social Work Service Staff

January 1978

INTRODUCTION

Social work service in this Division is provided to people age 60 and over who reside in Multnomah County and who are experiencing difficulties in personal and/or social relationships. The major emphasis is directed toward those elderly people who are in need of protective services: Namely, those whose behavior is harmful to themselves or others, who live in hazardous or unsafe conditions, who are neglected or exploited and who are unable, mentally or physically, to act in their own behalf and carry out the activities of daily living. Also included are the mentally ill, the alcoholic, and those in the direst of circumstances who are referred after others have tried and given up.

The goal of this service is to help these individuals in whatever way necessary to bring their situation under control for their safety and well-being; to reduce stress and to improve their functioning by mobilizing and enabling them to use those services that will help them function at the highest level of competence of which they are capable, and to do or get done for them those essentials they cannot do for themselves. The nature of the client's situation requires that most of the work is done in the field rather than in the office.

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A. SOCIAL WORK RESPONSIBILITIES

1. Work with Client: Assessment of the client in his total situation (personality structure, mental/physical health and functioning, nature of inter-personal relationships, family structure, defense mechanisms, living environment, etc.); developing a helping relationship as a vehicle in working with the client to improve his functioning. Also, recognizing that evaluation and treatment are dynamic and change as the client's situation improves or deteriorates. Assuming responsibility for on-going service to the client and planning termination as appropriate.
2. Work with Relatives who are experiencing difficulties in coping with problems of their parents, and who themselves are often middle-aged or retired, ill and facing their own decline, old age and death. This includes work with significant others in the client's life.
3. Crisis Intervention in the Division's own caseload when worker is absent and in referrals from the community-at-large. When a crisis occurs, staff members are expected to respond on request of supervisor. It is recognized that this is disruptive in any worker's plans but important for the client.
4. Advocacy in behalf of an individual client or a group. Being alert to situations and conditions that interfere with service delivery or impede social justice; bringing these to the attention to the Division or administration and proposing ideas for their resolution.

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5. Coordination of medical, social and legal resources in the community tailored to the needs of the client who is in need of protection. These include doctors, hospitals, health and welfare agencies, lawyers, the Office of Public Guardian, court systems, personnel in institutions, AAA Center staff and the natural systems network.
  6. Coordination with the Agency's Homemaker and Volunteer Divisions: Assuming responsibility for orienting the homemaker or volunteer to the client's situation, needs and problems, for introducing her to the client and for providing on-going support, help and coordination to the homemaker or volunteer through regular periodic meetings and appropriate telephone contacts.

B. GENERAL AGENCY RESPONSIBILITIES

- Maintaining a professional and positive attitude toward the agency.
- Attending staff meetings.
- Attending, and participating in Division meetings.
- Participating in agency activities.
- Accepting other agency assignments as requested (committees, special assignments, etc.)
- Adhering to agency policies and procedures.
- Respecting confidentiality.

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C. RECORD KEEPING

1. Keeping records current and in a manner prescribed by the Division. Among the many reasons for adequate record keeping are the following:

- Continuity of service to the client
- Satisfying requirements of the agency and contract
- Efficient collection of revenue due the agency
- Documenting assessments and services
- Defining agency's involvement in client's life
- Review, study and learning (by the worker)
- Teaching and supervision

2. Learning, using correctly and keeping current any forms required by the agency or contracts including but not limited to the following:

- Assessment and case plan
- All AAA and OPI forms
- Billings
- Written reports of psychiatric consultation (group and individual)
- Daily, time reports  
etc.



METROPOLITAN FAMILY SERVICE

BOARD OF DIRECTORS

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9/20/78

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234-3361 ext. 4721

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223-3331

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2433 N.E. 8th Ave. 97212  
282-9203

Mrs. Kay Toran  
Public Welfare Division  
415 Public Service Building  
Salem, OR 97310  
1-378-3755

J. Erik Townsend  
1509 N.E. 24th 97232  
288-1053

Mrs. Nancy Ryles, Ex-Officio  
11505 S.W. Jody  
Beaverton, OR 97005  
646-3061

Applicant Agency Name:  
Metropolitan Family Service

Date of Incorporation:

9/1/50

Type of Organization:

Public

Private Non-Profit

Private Profit

Other ( )

Short Statement of Agency Purposes: To provide relevant professional services to families and individuals in an effort to improve the quality of family life in the Metropolitan area.

Major agency bank account (give name of bank, address, and contact person):  
U.S. National Bank  
(no contact person without prior written permission from MFS)

Fiscal Accounting Arrangement (give name of staff person responsible or, if by contract, name of agency):  
Joe Martin

Does Applicant Agency have federal tax-exempt status? Yes  No

Does Applicant have liability and theft insurance? Yes  No

Amount: \$ 300,000

Type: Comp. General Liability

Insuring Agent: Fred S. James Company

Have key staff been bonded? Yes  No

(List individuals, by name and position, who have been bonded, amount and insuring agent.)

Blanket Fidelity Bond in effect for all employees handling funds or in position of influencing use of funds. \$10,000

Description of Lease Agreement: (describe the terms of the lease agreement---e.g., dates, excluded activities, and other conditions---or other arrangements for space availability)

Assurance of Compliance with  
"Nondiscrimination on Basis of Handicap"  
Section 504 of the Rehabilitation Act of 1973

Metropolitan Family Service (hereinafter called the "Contractor"), HEREBY

AGREES THAT it will comply with "Nondiscrimination on Basis of Handicap" Section 504, of the Rehabilitation Act of 1973, dated June 3, 1977, (hereinafter referred to as Section 504) and procedures established by City of Portland, Human Resources Bureau, Aging Services Division (hereinafter referred to as the Area Agency on Aging - AAA). The regulation defines and forbids acts of discrimination against qualified handicapped persons in employment and in the operation of programs/activities receiving assistance from the Department of Health Education and Welfare. The Contractor hereby gives assurance that it will immediately take measures necessary to effectuate this agreement.

As an employer, the Contractor agrees to make reasonable accommodation to the handicaps of applicants and employees unless the accommodation would cause the employer undue hardship, as defined in Section 504. This extends to all phases of employment including recruitment, selection and placement, compensation, promotion and transfer, disciplinary measures, demotions, layoffs and terminations, testing and training, daily working conditions, awards and benefits, and all other terms and conditions of employment.

The Contractor shall submit to the AAA, for analysis and recommendations, copies of their affirmative action plan and personnel policies which include provisions that assure the following:

1. No qualified handicapped person shall, on the basis of handicap, be subjected to discrimination in employment by the Contractor.
2. The Contractor shall make all decisions concerning employment in a manner which ensures that discrimination on the basis of handicap does not occur and may not limit, segregate, or classify applicants or employees in any way that adversely affects their opportunities or status because of handicap.
3. The Contractor shall not participate in a contractual or other relationship that has the effect of subjecting qualified handicapped applicants or employees to discrimination.
4. The Contractor shall make reasonable accommodation to the known physical or mental limitations of an otherwise qualified handicapped applicant or employee.

- 5. The Contractor shall not deny any employment opportunity to a qualified handicapped employee or applicant if the basis for the denial is the need to make reasonable accommodation.

As a provider of community services, the Contractor shall take appropriate steps in accordance with the established procedures, to assure that no qualified handicapped person, because of the Contractor's facilities are inaccessible to or usable by handicapped persons, be denied the benefits of, be excluded from participation in, or otherwise be subjected to discrimination under any program or activity. The Contractor's programs and activities, when viewed in its entirety, will be readily accessible to handicapped persons.

The Contractor hereby recognizes and agrees that an Assurance of Compliance with Section 504 is given in consideration of and for the purpose of obtaining any and all AAA contracts or other financial assistance extended after the date hereof to the Contractor by the AAA, including installment payments after such date on account of applications for AAA financial assistance which were approved before such date. The Contractor recognizes and agrees that such AAA financial assistance will be extended in reliance on the representations and agreements made in this Assurance, and that the AAA shall have the right to seek judicial enforcement of this Assurance. This Assurance is binding on the Contractor, its successors, transferees, and assignees, and the person whose signature appears below is authorized to sign this Assurance on behalf of the Contractor.

Dated this 19 day of May 1978.

By *Rald Yod*

Title Executive Director

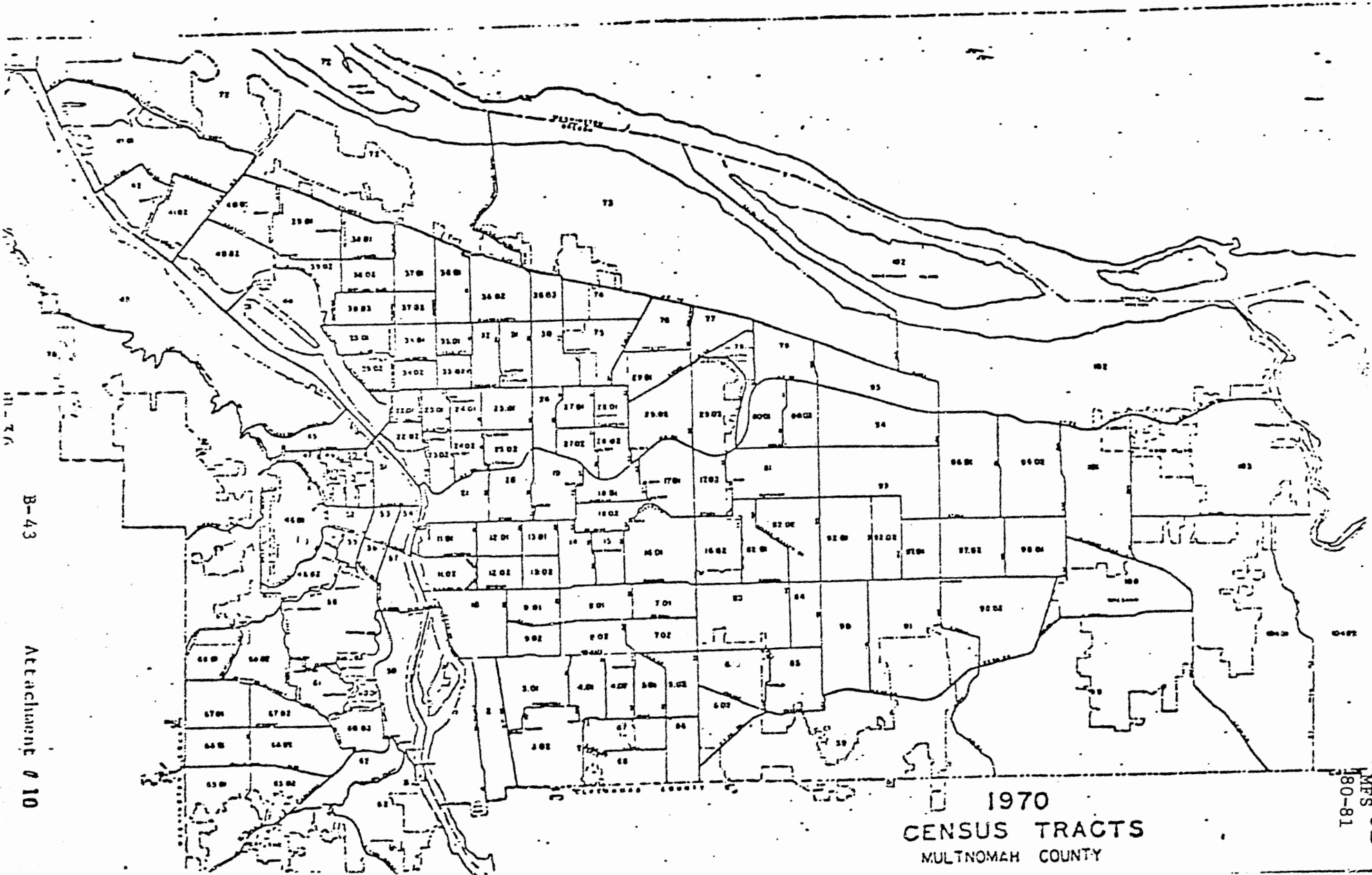
Contractor's mailing address

2281 N.W. Everett

Portland, OR 97210

Map of Service Area (Draw the boundaries of the service area of this project in heavy black lines on the map provided below.)

Service provided to the entire County area.



11-76

B-43

Attachment # 10

1970  
CENSUS TRACTS  
MULTNOMAH COUNTY

149829  
MPS  
80-81

86

EXHIBIT C  
REQUIRED REPORTING FORMS  
AND  
PROCEDURES

Monthly Report  
 IN-HOME SUPPORT SERVICES FOR THE MONTH OF \_\_\_\_\_

I. Referrals

A. Housekeeper

Source	# Received	# Accepted	# Denied	# Pending
District Centers				
Health Prof.				
Private Parties				
Other				

B. Homemaker

Source	# Received	# Accepted	# Denied	# Pending
District Centers				
Health Prof.				
Private Parties				
Other				

C. Case Management III

Source	# Received	# Accepted	# Denied	# Pending
District Centers				
Health Prof.				
Legal Prof.				
Private Parties				
Other				

II Short Term services

	This Month		Year-to-Date	
	Clients	½ hours	Clients	½ hours
A. Housekeeper	_____	_____	_____	_____
B. Homemaker I	_____	_____	_____	_____
C. Homemaker II	_____	_____	_____	_____







CODES: Client ServicesHousing

- 11 - Housing location
- 12 - Moving assistance
- 13 - Subsidized housing
- 14 - Major home repair
- 15 - Minor home repair (construction)
- 16 - Minor home repair (maintenance)
- 17 - Yard work
- 18 - Winterization
- 19 - Home security

Social Contact

- 21 - Friendly visiting
- 22 - Telephone reassurance
- 23 - Volunteer opportunities
- 24 - Education
- 25 - Recreation
- 26 - Escorted Group Activity

Information/Service Utilization

- 31 - Information
- 32 - Outreach
- 33 -
- 34 - Pre-retirement counseling
- 35 - Discretionary Service Units
- 36 - Escort
- 37 - Advocacy
- 38 - Scheduling
- 39 - Personal business

Income

- 41 - Emergency assistance
- 42 - Assistance in applying for government financial programs
- 43 - Adjustment of government benefits
- 44 - Financial assistance (other)
- 45 - Employment
- 46 - Subsidized employment
- 47 - Discounts/rebates

Transportation

- 51 - Transpo for housing
- 52 - Transpo for social contact
- 53 - Transpo for information/service utilization
- 54 - Transpo for income
- 55 - Transpo for congregate dining
- 56 - Transpo for shopping
- 57 - Transpo for protective/legal
- 58 - Transpo for work/school
- 59 - Transpo for health

In-home Assistance

- 61 - Housekeeper
- 62 - Housekeeper (MFS Only)
- 63 - Homemaker
- 64 - Homemaker Level I (MFS only)
- 65 - Homemaker Level II (MFS only)
- 66 - Home health care
- 67 - Personal care assistance

Protective/Legal

- 71 - Legal assistance
- 72 - Legal education
- 73 - Arrangement of guardianship/conservatorship
- 74 - Arrangement for protective living
- 75 - Money management
- 76 - Supportive counseling
- 77 - Nursing home placement
- 78 - Crisis Counseling
- 79 - Hours (PS only)

Nutrition

- 81 - Home delivered meals
- 82 - Congregate meals
- 83 - Nutrition counseling/education
- 84 - Food buying
- 85 - Shopping assistance (food)
- 86 - Food growing
- 87 - Meal preparation

Health

- 91 - Health screening
- 92 - Health education (diabetic clinic, etc.)
- 93 - Medical equipment
- 94 - Physical/occupational therapy
- 95 - Mental health services
- 96 - Detoxification
- 97 - Dental care
- 98 - Physician/out-patient care
- 99 - In-patient care, (hospital, etc.)
- 01 - Podiatry care
- 02 - Eye care
- 03 - Adult day care
- 04 - Hearing and speech

AGING SERVICES DIVISION/CLIENT TRACKING SYSTEM

Needs Assessment Form

Completed by: \_\_\_\_\_

Instructions: 1. Complete each starred (\*) Item 2. Complete other items as Appropriate

(\*) Action Code

(\*) Case Number

(\*) Assessment Date

2	
1	2

- 1. New
- 2. Reassessment

3									8

9									14

(\*) Client Name - Last

First

M.I.

(\*) Primary Responsibility

15																				26

51	52

27	28

29	30

31	32

33	34

35	36

37	38

39	40

41	42

43	44

45	46

47	48

49	50

00 - No Need

Housing

- 11 - Housing
- 12 - Home Repair
- 13 - Yard Maintenance
- 14 - Belongings Moved
- 15 - Weather Proofing
- 16 - Home Security

Income

- 41 - Employment
- 42 - Financial Assistance
- 43 - Money Management
- 44 - Clothing
- 45 - Food

In-Home Assistance

- 61 - Light Chore Services
- 62 - Home Health Care
- 63 - Meal Prep./Delivery
- 64 - Personal Care
- 65 - Heavy Housework

Nutrition

- 81 - Adequate Food Intake
- 82 - Food Purchase

Social Contact

- 21 - Regular Personal Contact
- 22 - Meaningful Activity
- 23 - Regular Reassurance
- 24 - Opportunities for Social Involvement

Transportation

- 51 - for Housing
- 52 - for Social Contact
- 53 - for Information
- 54 - for Income
- 55 - for Congregate Dining
- 56 - for Shopping
- 57 - for Protective/Legal
- 58 - for Nutrition
- 59 - for Health

Protective/Legal

- 71 - Protective Living Situation
- 72 - Legal Assistance
- 73 - Crisis Counseling
- 74 - Personal Security
- 75 - Counseling

Health

- 91 - Medical Screening
- 92 - Medical Care
- 93 - Medical Equipment
- 94 - Drug/Alcohol Treatment
- 95 - Mental/Emotional Treatment
- 97 - Dental Care

Information/Service Utilization

- 31 - Information
- 32 - Assist in Solving Individual Problems
- 33 - Assistance in Shopping

AREA AGENCY ON AGING  
CLIENT REPRESENTATIVE  
RECEIPT

PART A

Describe task to be performed/items to be purchased/bill to be paid:

Store or place of business:

\_\_\_\_\_  
\_\_\_\_\_

Amount of funds:

Check \$ \_\_\_\_\_

Cash \$ \_\_\_\_\_

Agreed, the above is correct information

Signature of Client Representative \_\_\_\_\_

Agency \_\_\_\_\_

Signature of Client \_\_\_\_\_

Date: \_\_\_\_\_

93

AREA AGENCY ON AGING  
CLIENT REPRESENTATIVE  
RECEIPT

PART A

Describe task to be performed/items to be purchased/bill to be paid:

Store or place of business:

\_\_\_\_\_  
\_\_\_\_\_

Amount of funds:

Check \$ \_\_\_\_\_

Cash \$ \_\_\_\_\_

Agreed, the above is correct information

Signature of Client Representative \_\_\_\_\_

Agency \_\_\_\_\_

Signature of Client \_\_\_\_\_

Date: \_\_\_\_\_

(Client's Copy)

94

PART B

Describe items purchased, or bill paid:

Store or place of business:

\_\_\_\_\_  
\_\_\_\_\_

Amount of funds returned to client:

\$ \_\_\_\_\_

Agreed the above is correct information.

Signature of Client Representative \_\_\_\_\_

Agency \_\_\_\_\_

Signature of Client \_\_\_\_\_

Date: \_\_\_\_\_

CP

PART B

Describe items purchased, or bill paid:

Store or place of business:

\_\_\_\_\_  
\_\_\_\_\_

Amount of funds returned to client:

\$ \_\_\_\_\_

Agreed the above is correct information.

Signature of Client Representative \_\_\_\_\_

Agency \_\_\_\_\_

Signature of Client \_\_\_\_\_

Date: \_\_\_\_\_



REQUEST FOR WAIVER

1. \_\_\_\_\_  
Name of Agency requesting waiver

2. Type of request  
 New  
 Review

3. Criteria to be waived  
Income  OPI Guidelines  
 AAA Guidelines  
 Age  Living Arrangement  
 Other Agency  Other \_\_\_\_\_  
Specify

4. \_\_\_\_\_  
Name of Client

5. \_\_\_\_\_  
CTS Case Number

6. Briefly describe the situation.  
(Attach a copy of the latest 101 & 102)

7. Resources Investigated

Services Requested

Outcome

_____	_____
_____	_____
_____	_____

8. \_\_\_\_\_ 9. \_\_\_\_\_  
Signature of Counselor Date Signature of Signature Date

DO NOT WRITE BELOW THIS LINE

10. Request is: Approved  AAA  OPI  
Temporarily Approved  AAA  OPI \_\_\_\_\_ Date  
Denied  AAA  OPI

11. Comments:

\_\_\_\_\_  
Signature of Reviewer Date

PORTLAND HUMAN RESOURCES BUREAU  
SOCIAL SERVICES DIVISION

PROCEDURES FOR CONTRACT MODIFICIATIONS

WHY:

Contract modifications are required in the following situations:

- change in total contract amount (increase or decrease)
- changes in staff salaries
- changes in staff positions to be supported through the contract
- changes in line item budget
- changes in number or type of services to be provided
- other substantial changes

HOW?

Contracts may be modified in 3 ways:

- ordinance-authorized by City Council
- contract change order-approval by Social Services Manager , Human Resources Bureau Executive Director, and Commissioner-in-Charge
- initial-by both parties

<u>Type of Change</u>	<u>Modification Procedure</u>
Total funds increase/decrease	Ordinance
Total same line item changes	Change Order
Staff salary	Change Order
Staff position	Change Order
Service Objectives	Change Order
General/special conditions	Ordinance/change order
Other substantial changes	Ordinance/change order
Clerical errors	Initial by both parties

PROCEDURE:

A. Initiated by City:

1. The City shall inform the Contractor in writing what and why changes are required, what information (if any) is needed from the Contractor to make such changes and what modification procedures will be utilized.

PORTLAND HUMAN RESOURCES BUREAU  
SOCIAL SERVICES DIVISION

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Staff position	Change Order
Service Objectives	Change Order
General/special conditions	Ordinance/change order
Other substantial changes	Ordinance/change order
Clerical errors	Initial by both parties

PROCEDURE:

A. Initiated by City:

1. The City shall inform the Contractor in writing what and why changes are required, what information (if any) is needed from the Contractor to make such changes and what modification procedures will be utilized.

2. City staff shall be responsible for obtaining necessary materials from the Contractor or shall prepare revised materials (to include revised contract or project applications pages) and amendment form, as necessary.

3. Contractor shall review material and indicate approval formally or informally.

4. If an Ordinance is required:

- City staff shall prepare and file Ordinance
- City shall notify Contractor of action on Ordinance
- If authorized by City Council, Contractor shall sign three (3) copies of amendment (if not already signed) and return to designated City office
- City staff shall obtain necessary City signatures
- Amendment goes into effect when both parties have signed and the changes are documented in the City Auditor's Office
- Fully signed copy shall be returned to the Contractor

5. If change order procedure is utilized:

- City staff shall prepare change order
- Program Staff, Accountant, Division Manager, HRB Executive Director, and Commissioner-in-Charge shall review and indicate approval
- Contractor shall sign Amendment and return to City
- Amendment goes into effect when City and Contractor signatures are obtained

B. Initiated by Contractor:

1. Contractor shall submit a letter to the Unit Director requesting modification. This letter should contain the following information:

- a. Specific changes desired (e.g. increase printing by \$500, decrease local travel by \$200 and decrease office supplies by \$300).
- b. Reason or need for changes (e.g. the newsletter mailing list has doubled so more copies are printed; counselors are carpooling in an effort to save gasoline).
- c. Statement regarding how these changes will affect the provision of services (e.g. line item changes are more consistent with actual spending patterns and services will continue to be delivered as specified in the contract).