

Grant Agreement 32000xxxxx CareOregon, Inc.

## **GRANT AGREEMENT NO.**

This Grant Agreement (“Agreement”) is between the CITY OF PORTLAND, OREGON (“CITY” or “GRANTOR”) and CareOregon, Inc (“CareOregon” or “GRANTEE”) in an amount not to exceed \$70,000, for the development of the model for a 24/7, triage and assessment unit that incorporates a network of services designed to meet the needs of individuals experiencing a behavioral health crisis, the Behavioral Health Emergency Coordination Network (“BHECN”).

## **RECITALS:**

1. The main goal of this grant is to contribute toward the development of BHECN, a 24/7, multi-partner, vigorous triage and assessment unit that covers a network of services designed to meet the acuity of individuals experiencing a behavioral health crisis and serve as a single point of access for the community - including EMS and Law Enforcement.
2. This re-designed BHECN increases and builds upon the existing Unity Psychiatric Emergency Service (PES) and includes an on-site sobering center and an adjacent Urgent Walk-In Clinic for people whose clinical needs can be managed in a less restrictive and less expensive environment than the Psychiatric Emergency Services (PES) unit.
3. This collaboration between the City of Portland and CareOregon, will help create direct linkages to appropriate community resources such as detox, the Multnomah County Behavioral Health Resource Center, outpatient clinics, and FQHCs.
4. The CITY now desires to award a grant to GRANTEE in an amount not to exceed \$70,000.

**THEREFORE**, in consideration of the mutual promises and covenants contained herein, the parties agree as follows:

## **ARTICLE I – SCOPE OF WORK/OUTCOME MEASURES**

GRANTEE agrees to participate in the development of a 24/7, triage and assessment unit that incorporates a network of services designed to meet the needs of individuals experiencing a behavioral health crisis, described in ATTACHMENT A: Scope of Work, ATTACHMENT B: Budget hereto, which by this reference are incorporated herein and made a part hereof.

## **ARTICLE II – AGREEMENT PERIOD**

This Agreement shall become effective on November 1, 2020 and will terminate on July 31, 2021 unless extended by amendment in conformance with Article V, Section G or terminated in conformance with Article V, Sections A-E.

## **ARTICLE III – SPECIFIC CONDITIONS OF THE GRANT**

- A. **Publicity:** During the term of this Grant Agreement, GRANTEE shall use its best efforts to mention the City’s grant funding in publicity regarding the program(s) that will be supported by the grant funds.

- B. Records: GRANTEE shall maintain all books, general organizational and administrative information, documents, papers, and records of GRANTEE that are related to this Agreement or GRANTEE's performance of work or services, for ten (10) years after CITY makes final grant payment, GRANTEE has made final report, or the termination date of this Agreement, whichever is later. GRANTEE shall provide CITY prompt access to these records upon request and permit copying as CITY may require.
- C. CITY Grant Manager: CITY hereby appoints Robert Day to act as its Project Manager about this Agreement. CITY may, from time to time, designate another person to act as the CITY Project Manager and will inform GRANTEE in writing of any change in Project Manager.

Robert Day  
Sobering Project Manager  
Office of the Mayor  
City of Portland,  
1221 SW 4<sup>th</sup> Avenue  
Portland, OR 97204  
Tel: 503-823-8657  
Email: Robert.day@portlandoregon.gov

- D. GRANTEE Project Manager: GRANTEE hereby appoints Jill Archer to act as its Project Manager regarding this Agreement. GRANTEE may, from time to time, designate another person to act as the GRANTEE Project Manager and will inform CITY in writing of any change in Project Manager.

Jill Archer  
VP Behavioral Health  
CareOregon, Inc  
315 SW 5<sup>th</sup> Avenue  
Portland, OR. 97204  
Tel: 503-502-0532  
Email: archerj@careoregon.org

- E. Billings/Invoices/Payment: The CITY Grant Manager is authorized to approve work, billings, and invoices submitted pursuant to this grant and to carry out all other CITY actions referred to herein in accordance with this Agreement.

#### **ARTICLE IV -- PAYMENTS**

Grant payments shall be distributed to GRANTEE in one total disbursement of \$70,000 within 30 days upon receipt of invoice from GRANTEE. Grant funds shall be used toward the development of the BHECN subject to the requirements as stated herein.

- A. Upon submission of an invoice by GRANTEE to CITY project manager, project manager will approve for payment. Payment will be made to the GRANTEE within 30 days of approval of the invoice.
- B. If for any reason GRANTEE receives a grant payment under this Grant Agreement and does not use grant funds, provide required services or take any

actions required by the Grant Agreement the CITY may, at its option terminate, reduce or suspend any grant funds that have not been paid and may, at its option, require GRANTEE to immediately refund to the CITY the amount improperly expended or received by GRANTEE.

- C. Grant payments under this Agreement may be used only to provide the services or take the actions listed previously in this Grant Agreement and shall not be used for any other purpose.
- D. If, for any reason, GRANTEE's anticipated services or actions are terminated, discontinued or interrupted (individually or collectively, "Cessation"), the CITY's payment of funds under this grant may be terminated, suspended or reduced. Any expenses for services provided in compliance with this Agreement and incurred prior to the Cessation shall be paid to GRANTEE shall be paid in full.
- E. Prevailing wages. If applicable, State of Oregon, Bureau of Labor and Industries (BOLI) wage rates are required for certain contracts that total \$50,000 and above. If GRANTEE's project is subject to the prevailing wage requirements, GRANTEE will comply with the prevailing wage requirements of ORS 279C.800 through 279C.870 and any other applicable prevailing wage requirements contained in ORS 279C, Oregon administrative rules, or city code.
- F. Prevailing wage indemnity. IF PREVAILING WAGE REQUIREMENTS ARE APPLICABLE, GRANTEE AGREES TO INDEMNIFY, DEFEND, AND HOLD HARMLESS CITY, ITS EMPLOYEES, OFFICERS, AND AGENTS, FROM AND AGAINST ANY CLAIM, SUIT, OR ACTION, INCLUDING ADMINISTRATIVE ACTIONS, THAT ARISE OUT OF GRANTEE'S FAILURE TO COMPLY WITH ORS 279C.800 TO 279C.870 AND ANY APPLICABLE ADMINISTRATIVE RULES OR POLICIES.

PARTIES ACKNOWLEDGE THE USE OF THE GRANT FUNDS ARE NOT SUBJECT TO PREVAILING WAGE REQUIREMENTS.

## **ARTICLE V -- GENERAL GRANT PROVISIONS**

- A. Cause for Termination; Cure. It shall be a material breach and cause for termination of this Agreement if GRANTEE uses grant funds outside of the scope of this Agreement, or if GRANTEE fails to comply with any other term or condition or to perform any obligations under this Agreement within thirty (30) days after written notice from CITY. If the breach is of such nature that it cannot be completely remedied within the thirty (30) day cure period, GRANTEE shall commence cure within the thirty (30) days, notify CITY of GRANTEE's steps for cure and estimated time table for full correction and compliance, proceed with diligence and good faith to correct any failure or noncompliance, and obtain written consent from CITY for a reasonable extension of the cure period.
- B. No Payment or Further Services Authorized During Cure Period. During the cure period, CITY is under no obligation to continue providing additional grant funds notwithstanding any payment schedule indicated in this Agreement. GRANTEE shall not perform services or take actions that would require CITY to pay additional grant funds to GRANTEE. GRANTEE shall not spend unused grant funds and such unused funds shall be deemed held in trust for CITY. GRANTEE

shall be solely responsible for any expenses associated with cure of its noncompliance or failure to perform.

- C. Termination for Cause. Termination for cause based on GRANTEE's misuse of grant funds shall be effective upon notice of termination. Termination for cause based on failure to comply or perform other obligations shall be effective at the end of the 30-day cure period unless a written extension of cure period is granted by CITY. GRANTEE shall return all grant funds that had not been expended as of the date of the termination notice. All finished or unfinished documents, data, studies, and reports prepared by GRANTEE under this Agreement shall, at the option of CITY, become the property of CITY; and GRANTEE may be entitled to receive just and equitable compensation for any satisfactory work completed on such documents up until the time of notice of termination, in a sum not to exceed the grant funds already expended.
- D. Penalty for Termination for Cause. If this Agreement is terminated for cause, CITY, at its sole discretion, may seek repayment of any or all grant funds tendered under this Agreement, and decline to approve or award future grant funding requests to GRANTEE.
- E. Termination by Agreement or for Convenience of City. CITY and GRANTEE may terminate this Agreement at any time by mutual written agreement. Alternatively, CITY may, upon thirty (30) days written notice, terminate this agreement for any reason deemed appropriate in its sole discretion. If the Agreement is terminated as provided in this paragraph, GRANTEE shall return any grant funds that would have been used to provide services after the effective date of termination. Unless the Parties agree otherwise, GRANTEE shall finish any work and services covered by any grant funds already paid and shall not commence any new work or services which would require payment from any unused grant funds.
- F. Changes in Anticipated Services. If, for any reason, GRANTEE's anticipated services or actions are terminated, discontinued or interrupted, CITY's payment of grant funds may be terminated, suspended or reduced. GRANTEE shall immediately refund to CITY any unexpended grant funds received by GRANTEE.
- G. Amendment. The Grant Manager is authorized to execute amendments to the scope of the services or the terms and conditions of this Agreement, provided the changes do not increase CITY's financial risk. Increases to the grant amount must be approved by the City Council unless the City Council delegated authority to amend the grant amount in the ordinance authorizing this Agreement. Amendments to this Agreement, including any increase or decrease in the grant amount, must be in writing and executed by the authorized representatives of the Parties and approved to form by the City Attorney.
- H. Non-discrimination; Civil Rights. In carrying out activities under this Agreement, GRANTEE shall not discriminate against any employee or applicant for employment because of race, color, religion, sex, age, handicap, familial status, sexual orientation or national origin. GRANTEE shall take actions to ensure that applicants for employment are employed, and that employees are treated during employment, without regard to their race, color, religion, sex, age, handicap, familial status, sexual orientation or national origin. Actions shall include but not be limited to, the following: employment, upgrading, demotion, or transfer;

recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship.

GRANTEE shall post in conspicuous places, available to employees and applicants for employment, notices, which state that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, or national origin. GRANTEE shall incorporate the foregoing requirements of this section in all other agreements for work funded under this Agreement, except agreements governed by Section 104 of Executive Order 11246.

- I. Audit. CITY, either directly or through a designated representative, may conduct financial or performance audit of the billings and services under this Agreement or GRANTEE records at any time during this Agreement and during the ten (10) year period established above in Article III.B. As applicable, audits will be conducted in accordance with generally accepted auditing standards as promulgated in *Government Auditing Standards* by the Comptroller General of the United States General Accounting Office. If an audit discloses that payments to GRANTEE exceeded the amount to which GRANTEE was entitled, then GRANTEE shall repay the amount of the excess to CITY.
- J. Indemnification. GRANTEE shall hold harmless, defend, and indemnify CITY, and its officers, agents and employees against all claims, demands, actions, and suits (including all costs) brought against any of them arising from actions or omissions of GRANTEE and/or its contractors in the performance of this Agreement.
- K. Insurance. GRANTEE shall obtain and maintain in full force at its expense, throughout the duration of the Agreement and any extension periods, the required insurance identified below. Should GRANTEE insurance coverage be determined to be insufficient relative to industry standards or regulatory requirements for services similar to those to be provided in this Agreement, CITY reserves the right to require additional insurance coverage as required by statutory or legal changes to the maximum liability that may be imposed on Oregon cities during the term of this Agreement.
  1. Workers' Compensation Insurance. GRANTEE, its contractors and all employers working under this Agreement shall comply with ORS Chapter 656 and as it may be amended from time to time. Unless exempt under ORS Chapter 656, GRANTEE, its contractors and any employers working under this Agreement shall maintain coverage for all subject workers for the duration of this Agreement.

In the event worker's compensation insurance coverage is due to expire during the term of this Agreement for any employers working under this agreement, GRANTEE agrees to require timely renewal of that insurance, either as a carrier-insured employer or a self-insured employer as provided by Chapter 656 of the Oregon Revised Statutes, before its expiration, and GRANTEE agrees to provide the CITY such further certification of worker's compensation insurance as renewals of said insurance occur.

2. Commercial General Liability Insurance: GRANTEE shall maintain commercial general liability and property damage insurance that protects GRANTEE and the CITY and its officers, agents, and employees from any and all claims, demands, actions, and

suits for damage to property or personal injury, including death, arising from GRANTEE's work under this Grant Agreement. The insurance shall provide coverage for not less than \$2,000,000 per occurrence.

3. Automobile Liability Insurance: GRANTEE shall have automobile liability insurance with coverage of not less than \$2,000,000 each accident. The insurance shall include coverage for any auto or all owned, scheduled, hired and non-owned auto. This coverage may be combined with the commercial general liability insurance policy.
4. Additional Insured: The liability insurance coverages, except Professional Liability, Errors and Omissions, or Workers' Compensation where applicable, shall be without prejudice to coverage otherwise existing, and shall name the City of Portland and its bureaus/divisions, officers, agents and employees as Additional Insureds, with respect to the GRANTEE's or its contractor's activities to be performed or services to be provided. Grantee shall provide proof of additional insured coverage in the form of an additional insured endorsement form or a policy coverage document acceptable to City. Coverage shall be primary and non-contributory with any other insurance and self-insurance. Notwithstanding the naming of additional insureds, the insurance shall protect each additional insured in the same manner as though a separate policy had been issued to each, but nothing herein shall operate to increase the insurer's liability as set forth elsewhere in the policy beyond the amount or amounts for which the insurer would have been liable if only one person or interest had been named as insured.
5. Continuous Coverage; Notice of Cancellation: GRANTEE shall maintain continuous, uninterrupted coverage for the duration of the Agreement. There shall be no termination, cancelation, material change, potential exhaustion of aggregate limits, or non-renewal of coverage without thirty (30) days written notice from GRANTEE to CITY. If the insurance is canceled or terminated prior to termination of the Agreement, GRANTEE shall immediately notify CITY and provide a new policy with the same terms. Any failure to comply with this clause shall constitute a material breach of the Agreement and shall be grounds for immediate termination of this Agreement.
6. Certificate(s) of Insurance: GRANTEE shall provide proof of insurance through acceptable certificates of insurance and a CG 2026 additional insured endorsement form (or an equivalent blanket additional insured form) to CITY on or before execution of the Agreement and prior to any commencement of work or delivery of goods or services under the Agreement or initial payment of grant funds. The certificate(s) will specify all the parties who are endorsed on the policy as Additional Insureds (or Loss Payees). Insurance coverages required under this Agreement shall be obtained from insurance companies acceptable to CITY. GRANTEE shall pay for all deductibles and premium from its non-grant funds. CITY reserves the right to require, at any time, complete and certified copies of the required insurance policies evidencing the coverage required. In lieu of filing the certificate of insurance required herein, if GRANTEE is a public body, GRANTEE may furnish a declaration that GRANTEE is self-insured for public liability and



property damage for a minimum of the amounts set forth in the Oregon Tort Claims Act (ORS 30.260 to 30.300).

- L. Grantee's Contractor; Non-Assignment. If GRANTEE utilizes contractors to complete its work under this Agreement, in whole or in part, GRANTEE shall require any of its contractors to agree, as to the portion contracted, to fulfill all obligations of the Agreement as specified in this Agreement. However, GRANTEE shall remain obligated for full performance hereunder, and CITY shall incur no obligation other than its obligations to GRANTEE hereunder. This Agreement shall not be assigned or transferred in whole or in part or any right or obligation hereunder, without prior written approval of CITY.
- M. Independent Contractor Status. GRANTEE, and its contractors and employees are not employees of CITY and are not eligible for any benefits through CITY, including without limitation, federal social security, health benefits, workers' compensation, unemployment compensation, and retirement benefits. GRANTEE will be responsible for any federal, state, or local taxes and fees applicable to payments hereunder.
- N. Conflict of Interest. No CITY officer or employee, during his or her tenure or for two (2) years thereafter, shall have any interest, direct or indirect, in Grant Agreement or the proceeds thereof. CITY officer or employee who selected GRANTEE, participated in the award of this Agreement or managed this Agreement shall not seek the promise of employment from GRANTEE or be employed by GRANTEE during the term of the Agreement, unless waiver is obtained from CITY in writing.
- O. Oregon Laws and Forum. This Agreement shall be construed according to the laws of the State of Oregon without regard to its provisions regarding conflicts of law. Any litigation between CITY and GRANTEE arising under this Agreement or out of work performed under this Agreement shall occur in Multnomah County court having jurisdiction thereof, and if in the federal courts, in the United States District Court for the State of Oregon.
- P. Compliance with Law. GRANTEE and all persons performing work under this Agreement shall comply with all applicable federal, state, and local laws and regulations, including reporting to and payment of all applicable federal, state and local taxes and filing of business license. If GRANTEE is a 501(c)(3) organization, GRANTEE shall maintain its nonprofit and tax-exempt status during this Agreement. GRANTEE shall be Equal Employment Opportunity (EEO) and Equal Benefits (EB) certified by CITY to be eligible to receive grant funds.
- Q. Independent Financial Audits/Reviews. Any grantee receiving \$300,000 or more in City funding, in any program year, is required to obtain an independent audit of the City-funded program(s).
- R. Severability. CITY and GRANTEE agree that if any term or provision of this Agreement is declared by a court of competent jurisdiction to be illegal or in conflict with any law, the validity of the remaining terms and provisions shall not be affected, and the rights and obligations of the Parties shall be construed and enforced as if the Agreement did not contain the particular term or provision held to be invalid.

- S. Merger. This Agreement constitutes the entire agreement between the Parties on the subject matter hereof, and supersedes all prior or contemporaneous written or oral understandings, representations or communications of every kind. No course of dealing between the Parties and no usage of trade will be relevant to supplement any term used in this Agreement.
- T. Program and Fiscal Monitoring. CITY shall monitor on an as-needed basis to assure Agreement compliance. Monitoring may include, but are not limited to, on site visits, telephone interviews and review of required reports and will cover both programmatic and fiscal aspects of the Agreement. The frequency and level of monitoring will be determined by the Grant Manager. Notwithstanding such monitoring or lack thereof, GRANTEE remains fully responsible for performing the work, services or obligations required by this Agreement in accordance with its terms and conditions.
- U. Third Party Beneficiaries. There are no third-party beneficiaries to this Agreement and may only be enforced by the Parties.
- V. Electronic Transaction; Counterparts. The Parties agree that they may conduct this transaction, including any amendments, by electronic means, including the use of electronic signatures. This Agreement, and any amendment, may be executed in any number of counterparts, each of which shall be deemed an original, but all of which together shall constitute a single instrument.
- W. NOTICE: Notices to Grantor under this Grant Agreement shall be sent to GRANTOR at the following address:

Robert Day, Sobering Project Manager  
Office of the Mayor  
City of Portland,  
1221 SW 4<sup>th</sup> Avenue  
Portland, OR 97204  
Tel: 503-823-8657  
Email: [Robert.day@portlandoregon.gov](mailto:Robert.day@portlandoregon.gov)

NOTICE: Notices to Grantee under this Grant Agreement shall be sent to GRANTEE at the following address:

Jill Archer, VP Behavioral Health  
CareOregon, Inc  
315 SW 5<sup>th</sup> Avenue  
Portland, OR. 97204  
Tel: 503-502-0532  
Email: [archerj@careoregon.org](mailto:archerj@careoregon.org)  
cc: Legal Affairs



CareOregon, Inc. Contract# 32000xxxx

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**SIGNATURES:**

**CITY OF PORTLAND**

\_\_\_\_\_  
Name: Michelle Kirby  
Title: Chief Financial Officer  
City of Portland, Oregon

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

**GRANTEE**

DocuSigned by:

*Eric C Hunter*

\_\_\_\_\_  
Name: Eric Hunter  
Title: Chief Executive Officer  
CareOregon Inc.

Date: 2/9/2021  
\_\_\_\_\_

**APPROVED AS TO FORM:**

\_\_\_\_\_  
City Attorney, City of Portland

## ATTACHMENT A

CareOregon

## SCOPE OF WORK

## Development of a 24/7, multi-partner triage and assessment unit

GRANTEE will use City funds to support GRANTEE's development of the BHECN a 24/7, multi-partner, robust triage and assessment unit that encompasses a network of services designed to meet the acuity of individuals experiencing a behavioral health crisis and serve as a single point of access for the community - including EMS and Law Enforcement. This re-designed triage and assessment unit expands and builds upon the existing Unity Psychiatric Emergency Service (PES) and includes an on-site sobering center and an adjacent Urgent Walk-In Clinic for people whose clinical needs can be managed in a less restrictive and less expensive environment than the Psychiatric Emergency Services (PES) unit.

This streamlined network of services will be designed around the "hub and spoke" model with the triage and assessment unit serving as the hub and "Service Lines" serving as the spokes; allowing for seamless transition to such Service Lines as the sobering unit, PES, and Urgent Walk In. This collaboration creates direct linkages to appropriate community resources such as detox, the Multnomah County Behavioral Health Resource Center, outpatient clinics, and FQHCs.

The development of the BHECN shall include achievement of the following.

- BHECN partners are aligned on guiding principles, value proposition, priorities, goals, and objectives of the BHECN.
- Clear project structure, roles, and functions among BHECN partners
- BHECN governance model and high-level operating model
- Top down understanding of cost for the design/development phases, and ongoing support of the BHECN operating model
- Potential funding streams/payment model identified

The deliverables for BHECN development are the following.

- BHECN Project Charter with timeline, structure/ governance, communication plan, key milestones, and value metrics
- BHECN architecture principles and guidelines with a Draft BHECN Governance model
- Draft high-level BHECN operating model
- High level evaluation of potential funding streams against existing operating models
- Top-down cost estimate for BHECN design and development phases and ongoing support of the BHECN
- List of potential funding streams

GRANTEE will use City's funds to support GRANTEE's development of the BHECN model which structure encompasses the connections to the Service Lines. However, capital investment or operations of the Service Lines and the operations of the BHECN model are not within the scope of this Agreement.

Any additional requested services beyond what is stated herein shall require an amendment or addendum for additional scopes of work.

CareOregon, Inc. Contract# 32000xxxx

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**ATTACHMENT B**

CareOregon

Budget

Development of a 24/7, multi-partner triage and assessment unit

City of Portland Contribution as a Grant to CareOregon, Inc.	\$70,000
CareOregon, Inc. Contribution to Project	\$70,000
Total Project Budget	\$140,000