

CONTRACT FOR SERVICES

151820

SECTION I: PARTIES TO THE CONTRACT

CITY OF PORTLAND ("City"), City Hall, 1220 S. W. Fifth Avenue, Portland, Oregon 97204, and NORTH PORTLAND ROTARY, INC. ("Contractor"), Peninsula Project ABLE, 7640 N. Jersey, Portland, Oregon 97203.

SECTION II: CONTRACT SUMMARY

Contractor agrees to provide information, referral, case management, and support services to elderly residents in the North Senior Service District in Portland/Multnomah County and further agrees that the total cost shall not exceed the sum of \$81,328.

SECTION III: PERIOD OF PERFORMANCE

Performance under this contract shall commence July 1, 1981, and continue through June 30, 1982, unless extended by City Council action.

SECTION IV: AGREED CONTRACTOR: PROJECT OPERATION

- A. Contractor shall, by June 30, 1982, 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 10% match against Title III-B (\$4,519), 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 service.
- 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 of or program evaluation by the City, is prohibited, except on written consent of the recipient or the recipient's attorney.

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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, forwarded, and training sessions scheduled.
- B. Required program reports shall be submitted by 3 p.m. of the fifth (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:

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-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; and

-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 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 of services and effective program management.
- G. City shall conduct on-site contract and facility reviews in accordance with a schedule developed by City.
- 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 \$81,328.
- B. An advance shall be made to cover the cost of the Contractor's initial expenses for operation, not to exceed the sum of \$13,554, upon receipt of a written request from the Contractor.

- 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 supporting documentation attached. All supporting documentation shall be annotated with the check number, budget line item number, service category, and funding source. Reimbursement requests shall be received by the fifteenth (15th) working day of each month. Reimbursement requests not received by the specified time shall be delayed and processed for payment the following month, or may result in suspension or in termination of contract. (Please note that suspension means that any expenses incurred during this period shall be the sole responsibility of the Contractor.) Payments shall also be delayed, 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. Retention of advances shall be predicated upon timely submission of reimbursement requests.
- 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).
- J. All items with a purchase price in excess of two hundred dollars (\$200) per item, hereunder, shall be for cash and not include any credit terms, and shall be reported to the City within ten (10) days, tagged by the City, included in the City's Property Control, and shall be the property of the City. Contractor shall maintain a current log (refer to Exhibit C) and copies of these logs shall be submitted with the final reimbursement. All non-expendable items shall be returned to the City within ten (10) days after contract termination.
- K. Contractor shall also maintain a current log (refer to Exhibit C) of all non-consumable supplies purchased under this contract. Non-consumable means items with a minimum value of twenty-five dollars (\$25) per item and a maximum value of two hundred dollars (\$200) per item. Copies of these logs shall also be submitted with the final reimbursement. All such items shall be returned to the City within ten (10) days after contract termination.

SECTION VIII: GENERAL CONDITIONS

- A. Contractor shall abide by all federal, state, and local regulations, policies, and procedures governing project operations, management, and service delivery. The funds shall be used solely 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 party 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.
 - (5) that the Contractor has qualified (a) as a direct responsibility employer under ORS 656.407 (Workers Compensation), or (b) as a contributing employer under ORS 656.411, or (c) if the contract is to be performed without the assistance of others, that Contractor has signed a joint declaration with the City that the services are rendered as an independent contractor.
- C. 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.
 - D. 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 it agrees 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.
 - E. 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.
 - F. Compensatory time accrued by an 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.
 - G. 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.

- H. 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 a 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. In performance, hereof, the Contractor shall comply with the provisions of the "non-discrimination on Basis of Handicap," Section 504 Assurance of Compliance of the Rehabilitation Act of 1973 (refer to Exhibit "A").
- D. The Contractor agrees to submit documentation as required by the City to support waivers of contract policies and requirements granted by the City.
- E. The Contractor shall use the service definitions as set forth by the City and standardized reporting forms as developed and provided by the City.
- F. Contractor shall enter into written agreements with the other Portland/Multnomah Area Agency on Aging service providers to specify and clarify procedures of coordination.
- G. 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.
- H. 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.

- I. The Contractor shall:
- (1) provide each older person with a free and voluntary opportunity to contribute to the cost of the service;
 - (2) protect the privacy of each older person with respect to his/her contribution;
 - (3) establish appropriate internal controls to safeguard and account for all contributions;
 - (4) use all contributions in accordance with OEA Policy and Procedures Manual: Part III, Section 23, "Income Definitions and Match;"
 - (5) develop a suggested contribution schedule for services under this contract. In developing the schedule, income ranges of older persons in the community and the Contractor's other sources of income should be considered;
 - (6) assure that no older person is denied a service because the older person will not or cannot contribute to the cost of the service; and
 - (7) not require older persons to disclose information regarding income or resources as a condition for providing services.
- J. The Contractor shall serve all eligible clients within their boundaries and shall not solicit clients outside those boundaries. If the client wishes to be served by a contractor from another district, the situation will be documented and a letter of agreement signed on the transfer of the client between the two contractors. A request for waiver shall be submitted prior to transfer.
- K. Contractor shall continue or initiate efforts to obtain support from other sources.
- L. The Contractor agrees that a written request for modification which results in a reduction in the number or type of services may result in a reduction of funds available from the City under this contract.
- M. Contractor shall submit copies of logs which list non-expendable (\$100 or more per item) and non-consumable (minimum value of \$25 to a maximum value of \$99.99 per item) items from your previous contracts by August 31, 1981.

- N. No employee of the Contractor or member of the Contractor's governing board or body or persons who exercise any responsibilities under his contract shall participate in any decision relating to this contract which affects his outside, personal pecuniary interests.
- O. The Contractor shall support an advisory committee which meets at least bi-monthly and which meets the following criteria;
- (1) The membership shall be broadly representative of the elderly population of the Aging Services District and should include representatives of both sexes of major ethnic groups, as well as professionals, business, labor, government, education, volunteer, civic groups, and consumers of services.
 - (2) Persons age 60 and older shall make up more than fifty percent (50%) of the advisory committee membership.
 - (3) Members shall serve without pay and accrue no financial benefit as a result of membership on the advisory committee (does not preclude reimbursement for costs incurred).
 - (4) The Advisory Committee shall have written by-laws which shall include the responsibility (1) to advise the Contractor regarding policies, programs, and actions affecting the delivery of services under this contract and (2) to review and comment on policies, programs, and actions of other agencies which affect older people residing in the Aging Services District.
- P. The Contractor shall provide the City with copies of the current advisory committee by-laws and a current list of advisory committee members, such documents to be sent to the City not more than sixty (60) days after execution of this agreement. The Contractor further agrees to submit any changes within thirty (30) days of their effective date.
- Q. The Contractor shall submit to the City, minutes of the meetings of the District Advisory Committee within ten working days after the meeting.
- R. The Contractor shall participate with the City in the on-going development and implementation of a standardized information, referral, and case management system.
- S. Contractor shall develop procedures cooperating with the City Basic Emergency Plan in serving the needs of the "at risk" elderly during a designated emergency and submit to the City for approval by August 3, 1981.

- T. Contractor shall notify the City of any change in operating hours or closure of the agency for any reason other than those holidays which are designated in the contract by 9 a.m. of the date of change or closure.
- U. Contractor agrees to cooperate with the Area Agency on Aging in the development of an agreement to provide case management and access to area-wide services for elderly individuals who reside in Housing Authority buildings in the census tracts covered under this contract and who are identified as eligible for such services by October 1, 1981.
- V. Contractor shall submit any corrections to monthly program reports and client tracking documents no later than ninety (90) days after the end of the quarter during which the service occurred; with the exception of year end close out. Any corrections to fourth quarter program reports and client tracking documents must be submitted within thirty (30) days from the end of the contract period.

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

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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 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 Eric E. Holman
Executive Director

By _____
Authorized Representative

APPROVED AS TO FORM

CITY OF PORTLAND

By _____
City Attorney

By _____
Commissioner of Public
Utilities

By _____
City Auditor

PROJECT APPLICATION
HUMAN RESOURCES BUREAU
City of Portland

EXHIBIT A
NO
81/82
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1. Project Title North Aging District Services

2. Type of Application (check one) New Continuing

3. Applicant Agency:

Name North Portland Rotary, Inc.

Address 7640 North Jersey

Portland, Oregon 97203

Phone Number 286-8228

Project Director Sheila Driscoll

Official Authorized to Bind Agency Earl Busacker, President

Financial Officer Eric Lieberg, Treasurer

4. Contract Period: From July 1, 1981 To June 30, 1982

5. Budget Period: From July 1, 1981 To June 30, 1982

6. City Support Requested \$81,328

NO
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PROJECT NARRATIVE1. Summary of Project

Describe in 300-400 words the project plan presented in this application. The summary should be able to stand by itself as a clear and complete description of the project.

Address:

- Statement of Problem (Provide a concise description of the conditions and problems to be addressed by the project. Use quantifiable, measurable terms.)
- Project Goals (State the intent of the project to change, reduce, or eliminate the problem(s) identified above.)
- Strategies for Delivering Services (Describe the general approach to meeting the goals stated above.)

Peninsula Project ABLE, to prevent unnecessary institutionalization, will provide the following services for North Portland senior citizens during the period July 1, 1981 through June 30, 1982; 2,379 requests for information; 516 requests for referrals; needs assessment for 66 unduplicated older people; Level 1 case management for 146 older people; Level 2 case management for 51 unduplicated older people; 20 units of outreach services; special transportation services to support 100 open access and 150 closed access referrals for a total of 1,000 rides; counseling services for 56 unduplicated people; and 60 educational events to be attended by elderly residents. The target population will be those individuals meeting the established Area Agency on Aging target population criteria. The North Portland Rotary, with the advice received from the Seniors North Committee, will administer Peninsula Project ABLE. The Senior Services Director will be responsible for the day-to-day coordination of the Project. Two full-time and one 60% time counselors, one full-time information and referral specialist, one 48% time driver/escort, and one 25% time recreational leader to provide the direct services stated. Peninsula Project ABLE, Seniors North Committee, and North Portland Rotary will continue to effectively inform and involve community organizations and community agencies about senior citizens problems to promote solutions to these problems. Peninsula Project ABLE will coordinate its project activities with other major programs or projects affecting senior citizens so that maximum utilization can be achieved to the benefit of North Portland senior citizens.

Service Area, Target Population and Eligibility Criteria for Services: 151820
(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: The Peninsula Project ABLE will provide services to elderly residents in North Portland in the following census tracts: 35.01, 35.02, 37.01, 38.01, 38.02, 38.03, 39.01, 39.02, 40.01, 40.02, 41.01, 41.02, 42, 44, 72. Individuals residing outside the area can be served only with the express approval of the Area Agency on Aging Contract Unit (see waiver procedures) and with the knowledge and approval of the contractor for the service area in which the individual resides.

Target Population: These elderly individuals 60 years of age and older who are functionally impaired and resource limited to the extent that services are necessary to maintain independent living are a priority to access and array of AAA services. Case management is provided for low income persons, age 60 and older, who have age related or age intensified physical and/or mental impairments which make premature or inappropriate institutionalization more likely. Case management clients are given priority for services within the AAA service delivery system.

Eligibility Criteria: Services such as information and referral, outreach, individual assessment, advocacy, crisis/emergency services, recreation and education are provided to residents of Multnomah County who are age 60 and older without eligibility limitations. Eligibility for case management, escort, transportation, friendly visiting, chore/home maintenance, shopping assistance, counseling, housekeeping and money management is established through a needs assessment performed by a trained staff person which determines: 1) that the individual is in need of services to sustain independent living; 2) that the individual is not eligible for those services from another agency legally responsible for their provision; 3) that the individual does not have friends or relatives able and willing to provide the services for him/her; 4) that, net income levels not exceed 125% of poverty guidelines plus a 10% inflation factor (474 for single persons and \$629/month for couples). In exceptional circumstances and with express approval (see waiver request procedures) of the Area Agency on Aging Contracts Unit, services may be provided to individuals who do not meet all of the aging criteria.

PROGRAM ELEMENTS/STAFFING PATTERNS

PERFORMANCE INDICATORS

2. Increase access to needed services among elderly residents through the provision of information (simple)* and information (complex)* services in response to 2,379 requests for information and assistance during the period July 1, 1981 through June 30, 1982.

Number of information (simple) services provided.
 Number of information (complex) services provided.

Administration: 4% of contracted personnel costs.
 1. Monitor contracted monies and services to insure contract compliance and quality of service.
 Staff: Senior Services Director, .5 % 1 FTE.
 2. Complete and submit required program and invoice reports in the proper form and manner in accordance with all related General Conditions as required.
 Staff: Senior Services Director, .75% 1 FTE.
 Infor/Referral Specialist, 1% 1 FTE.
 3. Provide adequate supervision of assigned staff.
 Staff: Senior Services Director, 1.25% of 1 FTE.

Service: 46% of contracted personnel costs.

1. Respond to an inquiry for information or assistance requiring the provision of simple or detailed data about community services available to older persons.
 Staff: Infor/Referral Specialist, 36.7% 1 FTE.
2. Utilize a resource file, maintained with up-to-date information, as a basis for the information provided.
 Staff: Infor/Referral Specialist, 10.78% 1 FTE.
3. Document the information services initiated and completed.
 Staff: Infor/Referral Specialist, 1.47% 1 FTE.

* Provision of information and referral services with definitions and standards published May, 1978, by the National Alliance of Information and Referral Services (AIRS).

4. Provide service coordination and resource development.
 Staff: Senior Services Director 7.5% 1 FTE.

OBJECTIVE

3. Increase Access to needed services among elderly residents through the provision of referral (simple)* and referral (complex)* in response to 516 requests for the period July 1, 1981 - June 30, 1982.

PERFORMANCE INDICATORS

- Number of referrals (simple services provided.
Number of referrals (complex) services provided.

PROGRAM ELEMENTS/STAFFING PATTERNS

Administration: 4% of contracted personnel costs.
1. Monitor contracted monies and services to insure contract compliance and quality of service.
Staff: Senior Services Director, .5 % FTE.

2. Complete and submit required program reports and invoices in the proper form and manner in accordance with all related General Conditions as required.
Staff: Senior Services Director, .75 % FTE.

3. Provide adequate supervision of assigned staff.
Staff: Senior Services Director, 1.25% FTE.

Services: 46% of contracted personnel costs.

1. Respond to an inquiry which requires active participation in linking the inquirer to the needed service to respond to the inquiry.

Staff: Infor/Referral Specialist, 6.12% 1 FTE.

2. Accept inquiries by way of a telephone call, or office visit, or correspondence from an older person or from an agency or an interested individual seeking service.

Staff: Information/Referral Specialist, 6.12% 1 FTE.
3. Arrange secondary referrals to facilitate inquirer access to needed services such as escort, transportation or housekeeping services.

Staff: Infor/Referral Specialist, 24.5 % 1 FTE.

4. Provide follow-up to determine the outcome of the referral and provide additional assistance in locating or utilizing these or other services if the follow up contact indicates this is necessary.

Staff: Infor/Referral Specialist, 4.9 % 1 FTE.

5. Maintain a resource file with up-to-date information, as a basis for making referrals.

Staff: Infor/Referral Specialist, 6.37 % 1 FTE.

6. Document the referrals initiated and completed.

Staff: Infor/Referral Specialist, .98 % 1 FTE.

- * Provision of information and referral services is to be in accordance with definitions and standards published May, 1978, by the National Alliance of Information and Referral Services (AIRS).

7. Provide service coordination and resource development.
Staff: Senior Services Director 7.5% 1 FTE.

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PROGRAM ELEMENTS/STAFFING PATTERNS

PERFORMANCE INDICATORS

OBJECTIVE

<p>4. Improve access of all older people to services and community resources by the provision of a needs assessment in their homes of 66 unduplicated older people during the period of July 1, 1981 through June 30, 1982.</p>	<p>Number of assessments made for non-case management clients.</p> <p>Number of unduplicated individuals receiving services.</p> <p>Number of hours of assessment.</p>	<p>Administration: 6% of contracted personnel costs.</p> <p>1. Monitor contracted monies and services to insure contract compliance and quality of service. Staff: Senior Services Director, .2% of 1 FTE.</p> <p>2. Complete and submit required program and invoice reports in the proper form and manner in accordance with all related General Conditions as required. Staff: Senior Services Director, .3% 1 FTE.</p> <p>3. Provide adequate supervision of assigned staff. Staff: Senior Services Director, .5% 1 FTE.</p> <p>Services: 94% of contracted personnel costs.</p> <p>1. Conduct an in-home visit at the request of an individual, family member, or agency representative. Staff: Counselors, .571% 2.6 FTE.</p> <p>2. Conduct a comprehensive needs assessment including 4 basic elements. Staff: Counselors, .571% 2.6 FTE.</p> <p>3. Determine the eligibility for, and the availability of community resources to meet the individual needs. Staff: Counselors, .571% 2.6 FTE.</p> <p>4. Explore the options of service with the client. Staff: Counselors, .571% 2.6 FTE.</p> <p>5. If appropriate, refer to community resources. Staff: Counselors, .571% 2.6 FTE.</p> <p>6. Submit the completed Client Tracking System form (101-102) as "assessment only" client. Staff: Counselors, 1% 2.6 FTE.</p> <p>7. Follow-up with the individual or agencies to determine of referrals if appropriate. Staff: Counselors, .571% 2.6 FTE.</p> <p>8. Provide advocacy, if required, to facilitate the delivery of service. Staff: Counselors, .571% 2.6 FTE.</p> <p>9. Provide Service coordination and resource development. Staff: Senior Services Director 4% 1 FTE.</p>
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PROGRAM ELEMENTS/STAFFING PATTERNS

PERFORMANCE
INDICATORS

OBJECTIVE

5. Maintain access to needed services among elderly residents by providing 146 different individuals who meet the established needs criteria with 2,190 hours of Level I case management and with an average caseload of 105 during the period July 1, 1981 through June 30, 1982.

Number of different persons with a service plan.
Number of different persons with overdue reassessments.
Number of persons served.
Number of hours of service provided.

Administration: 7% of contracted personnel costs.
1. Monitor contracted monies and services to insure contract compliance and quality of services. 1.4% FTE.
2. Complete and submit required program reports and invoices in the proper form and manner in accordance with all related General Conditions as required.
Staff: Senior Services Director, 2.1% FTE.
3. Provide adequate supervision of assigned staff.
Staff: Senior Services Director, 3.5% FTE.

Services: 93% of contracted personnel costs.

1. Conduct face-to-face interviews with clients, in the client's home, to assess client needs, identify available resources, and explore alternative courses to meet the identified needs.
Staff: Counselors, 10.4% of 2.6 FTE.

2. Fill out appropriate Client Tracking System forms and assign each client to a level of case management services that are needed for ongoing maintenance and periodic monitoring to prevent development of more serious problems which would threaten independent living.
Staff: Counselors, 2.08% of 2.6 FTE.

3. Develop a written service plan on forms provided by the AAA which must include 10 basic elements regarding the individual client.
Staff: Counselors, 2.08% of 2.6 FTE.

4. Arrange for implementation and monitoring activities as set forth in the service plan.
Staff: Counselors, 10.4% of 2.6 FTE.

5. Maintain a case file to include at least 5 basic elements of the information data regarding the individual client.
Staff: Counselors, 2.08% of 2.6 FTE.

6. Reassess the client's situation at least every six months to determine progress towards goals, or changes in the situation which would require changes in the service plan, and need for ongoing services.
Staff: Counselors, 10.4% of 2.6 FTE.

7. Prepare a written plan review at least every six months to include 8 basic elements regarding the individual client.

8. When indicated by the individual clients change

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PERFORMANCE INDICATORS

NO 81/82

PROGRAM ELEMENTS/STAFFING PATTERNS

OBJECTIVE

5. Case Management Level 1 continued.

situation, reassign the client to a different level of case management or open access services; or terminate or transfer the client.

Staff: Counselors, 10.4% of 2.6 FTE.

9. Submit in a timely manner Client Tracking System (CTS) forms to document client characteristics, needs assessment and reassessments, and services provided in accordance with CTS instructions.

Staff: Counselors, 2.08% of 2.6 FTE.

10. Provide service coordination and resource development.

Staff: Senior Services Director 15% 1 FTE.

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PROGRAM ELEMENTS/STAFFING PATTERNS

PERFORMANCE INDICATORS

OBJECTIVE

6. Maintain access to needed services among elderly residents by providing 51 different individuals who meet the established needs criteria with 865 hours of level II case management and with an average caseload of 38 during the period July 1, 1981 through June 30, 1982

Number of different persons with a case plan.
Number of different persons with overdue reassessments
Number of persons served.
Number of hours of service provided.

Administration: 7% of contracted personnel costs.
1. Monitor contracted services and services to insure contract compliance and quality of services.

Staff: Senior Services Director, 2.0% FTE.
2. Complete and submit required program reports and invoices in the proper form and manner in accordance with all related General Conditions as required. .72% 1 FTE.

Staff: Senior Services Director, .72% 1 FTE.

3. Provide adequate supervision of assigned staff.
Staff: Senior Services Director, 1.2% 1 FTE.

Services: 93% of contracted personnel costs.

1. Conduct face-to-face interviews with clients, in the clients home, to assess client needs, identify available resources, and explore alternative sources to meet the identified needs.
Staff: Counselors, 3.6% 2.6 FTE.

2. Fill out appropriate Client Tracking System forms and assign each client to a level of case management services that are needed for intervention and intensive casework to sustain independent living.
Staff: Counselors, .72% 2.6 FTE.

3. Develop a written case plan which must include 14 basic elements regarding the individual client.
Staff: Counselors, .72% 2.6 FTE.

4. Arrange for implementation and monitoring activities as set forth in the case plan which will include any of the 6 basic service elements as they apply to the individual client.
Staff: Counselors, 3.6% 2.6 FTE.

5. Maintain a case file to include at least 5 basic elements of the information data regarding the individual client.
Staff: Counselors, .72% 2.6 FTE.

6. Reassess the client's situation at least every 3 months to determine progress towards goals, or changes in the situation which would require changes in the case plan, and need for ongoing services.
Staff: Counselors, 3.6% 2.6 FTE.

7. Prepare a written plan review at least every 3 months to include 8 basic elements regarding the individual client.
Staff: Counselors, .72% 2.6 FTE.

8. When indicated by the individual client's changed situation, reassign the client to a different level of case management or open access services; or terminate or transfer the client.
Staff: Counselors, 3.6% 2.6 FTE.

PROGRAM ELEMENTS/STAFFING PATTERNS

PERFORMANCE INDICATORS

OBJECTIVE

6. Case Management Level 2 continued

- 9. Submit in a timely manner Client Tracking System (CTS) forms to document client characteristics, need assessments and re-assessments, and services provided in accordance with CTS instructions.
Staff: Counselors, .77% 2.6 FTE.
- 10. Provide service coordination and resource development.
Staff: Senior Services Director 5.3% 1 FTE.

PROGRAM ELEMENTS/STAFFING PATTERNS

PERFORMANCE
INDICATORS

7. To increase the access to and utilization of appropriate services by homebound, isolated and/or at risk elderly through the provision of twenty units of outreach services during the period July 1, 1981 through June 30, 1982.

Number of unduplicated elderly individuals identified as isolated, homebound and/or at risk.

Administration: 6% of contracted personnel costs.
 1. Monitor contracted modes and services to insure contract compliance and quality of service.
 Staff: Senior Services Director, .2 % 1 FTE.
 2. Complete and submit required program and invoice reports in the proper manner in accordance with all related General Conditions as required.
 Staff: Senior Services Director, .3 % 1 FTE.
 3. Provide adequate supervision of assigned staff.
 Staff: Senior Services Director, .5 % 1 FTE.

Services: 94% of contracted personnel costs.

1. Conduct an outreach effort to identify and locate hard to reach individuals on a one-to-one basis.
 Staff: Counselors, 1 % 2.6 FTE.
2. Conduct a comprehensive needs assessment including 4 basic elements.
 Staff: Counselors, .5 % 2.6 FTE.
3. Determine the eligibility for, and the availability of community resources to meet the individual needs.
 Staff: Counselors, .5 % 2.6 FTE.
4. Explore the options of service with the client.
 Staff: Counselors, .5 % 2.6 FTE.
5. If appropriate, refer to community resources.
 Staff: Counselors, .5 % 2.6 FTE.
6. Submit the completed Client Tracking System form (101-102) as "outreach only" client.
 Staff: Counselors, 1 % 2.6 FTE.
7. Follow-up with the individual or agencies to determine outcome of referrals, if appropriate.
 Staff: Counselors, .5 % 2.6 FTE.
8. Provide advocacy, if required, to facilitate the delivery of service.
 Staff: Counselors, .5 % 2.6 FTE.
9. Provide service coordination and resource development.
 Staff: Senior Services Director 4% 1 FTE.

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PROGRAM ELEMENTS/STAFFING PATTERNS

PERFORMANCE INDICATORS

OBJECTIVE

8. Increase access to needed services by providing immediate transportation services to 200 individuals with 1,000 one way rides. These individuals would be unable to obtain necessary services without immediate transportation services.

Number of unduplicated individuals receiving immediate transportation services.

Number of one way rides provided.

- Administration: 10% of contracted personnel costs.
1. Monitor contracted modes and services to insure contract compliance and quality of service.
Staff: Senior Services Director, .58% 1 FTE.
 2. Complete and submit required program and invoice reports in the proper form and manner in accordance with all required General Conditions as related.
Staff: Senior Services Director, .87% 1 FTE.
 3. Provide adequate supervision of assigned staff.
Staff: Senior Services Director, 1.45% 1 FTE.

Services: 90% of contracted personnel costs.

1. Provide immediate transportation services to individuals listed for services.
Staff: Driver/escort, 44% 1 FTE.
2. Report needed auto repairs and maintenance to the Senior Services Director.
Staff: Driver/escort, 1% 1FTE.
3. Report unusual client needs to the appropriate staff.
Staff: Driver/escort, 3% 1 FTE.
4. Provide service coordination and resource development.
Staff: Senior Services Director, 2% 1 FTE.

N

OBJECTIVE

9. To increase knowledge in areas of special interests to older persons by providing 12 educational events for 120 unduplicated individuals.

PERFORMANCE INDICATORS

Kinds of events held.
Number of educational events held.
Number of unduplicated individuals served.

PROGRAM ELEMENTS/STAFFING PATTERNS

NO
81/82

Administration: 10% of contracted personnel costs.
1. Monitor contracted monies and services to insure contract compliance and quality of service.
Staff: Senior Services Director, .5% 1 FTE.
2. Complete and submit required program and invoice reports in the proper form and manner in accordance with all the required General Conditions as related.
Staff: Senior Services Director, .75% 1 FTE.
Recreational Leader, 2% 1 FTE.
3. Provide adequate supervision of assigned staff.
Staff: Senior Services Director, 1.25% 1 FTE.

Services: 90% of contracted personnel costs.
1. Provide educational services for older individuals attending such events.

Staff: Recreational Leader, 7% 1 FTE.

2. Organize educational events for older individuals interested in attending such events.

Staff: Recreational Leader, 9% 1 FTE.

3. Report unusual client needs to the appropriate staff.

Staff: Recreational Leader, 1% 1 FTE.

4. Document educational events as initiated and completed.

Staff: Recreational Leader, 2% 1 FTE.

5. Provide service coordination and resource development.
Staff: Senior Services Director 18% 1 FTE

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PERFORMANCE
INDICATORS

OBJECTIVE

10. Maintain access to needed services among elderly residents by providing 56 individuals with 842 hours of counseling services and with an average case-load of 39 during the period July 1, 1981 through June 30, 1982.

Number of different individuals with a service plan.

Number of different individuals with reassessments due.

Number of hours of service provided.

PROGRAM ELEMENTS/STAFFING PATTERNS

NO
81/82

- Administration: 8% of contracted personnel costs.
 1. Monitor contracted monies and services to insure contract compliance and quality of service.
 Staff: Senior Services Director, .1 % 1 FTE.
 2. Complete and submit required program and invoice reports in the proper form and manner in accordance with all related General Conditions as required.
 Staff: Senior Services Director, 1.2% 1 FTE.
 3. Provide adequate supervision of assigned staff.
 Staff: Senior Services Director, .2 % 1 FTE.

Services: 92% of contracted personnel costs.

1. Conduct face-to-face interviews with clients, in the client's home, to access client needs, identify available resources, and explore alternative courses to meet the identified needs.
 Staff: Counselors, 4% of 2.6 FTE.
2. Fill out appropriate Client forms and assign each client to a level of counseling services.
 Staff: Counselors, .8% of 2.6 FTE.
3. Develop a written service plan regarding the individual client.
 Staff: Counselors, .8% of 2.6 FTE.
4. Arrange implementation and monitoring activities as set forth in the service plan.
 Staff: Counselors, 4% of 2.6 FTE.
5. Maintain a case file to include at least 5 basic elements of the information data regarding the individual client.
 Staff: Counselors, .8% of 2.6 FTE.
6. Reassess the client's situation at least every six months to determine progress towards goals, or changes in the situation which would require changes in the service plan, and need for ongoing services.
 Staff: Counselors, 4% of 2.6 FTE.
7. Prepare a written plan review at least every six months regarding the individual client.
 Staff: Counselors, .8% of 2.6 FTE.
8. When indicated by the individual clients changed situation, reassign the client to a different level of case management or open access services; or terminate or transfer the client.
 Staff: Counselors, 4% of 2.6 FTE.
9. Submit in a timely manner Client forms to document client characteristics, needs assessments and reassess-

N

OBJECTIVE

10. Counseling services continued.

PERFORMANCE INDICATORS

PROGRAM ELEMENTS/STAFFING PATTERNS

NO 81/82

ments, and services provided.
Staff: Counselors, .8% or 2.6 FTE.

10. Provide service coordination and resource development.
Staff: Senior Services Director 10.9% 1 FTE.

4. Center Organization (Briefly describe the staffing pattern, operating hours, and official holidays. Describe safety and accountability procedures regarding center coverage and emergencies.)

North Portland Rotary will be responsible for the administration of Peninsula Project ABLE. The Seniors North Committee will advise North Portland Rotary about senior citizens' problems, concerns, and priorities. The senior services director will be responsible for the general supervision, training, evaluation, program review, and resource development for the Project, in addition to the daily supervision of the staff. The counselors are responsible for the case management, needs assessment, outreach, and counseling services. The information and referral specialist is responsible for providing information and referral services. The driver/escort is responsible for providing the special transportation services. The recreational leader is responsible for providing the educational services at the Peninsula Senior Center.

Normal operating hours are 8:30 a.m. to 5:30 p.m. Monday through Friday's. The following are paid holidays; New Year's Day, President's Day, Memorial Day, Independence Day, Labor Day, Veteran's Day, Thanksgiving and Christmas.

Local agencies have agreed that the Neighbors North Office will take the lead coordination role during an emergency. The Peninsula Senior Center will close during inclement weather emergencies; the phone at the Peninsula Senior Center will be put on call-forward to the Peninsula Project ABLE Office. The Project ABLE staff will follow the plan established by the Central Emergency Station when initiated by the City of Portland, coordinate special neighborhood problems with the Neighbors North Office, and cancel any planned activities at Project ABLE and the Peninsula Senior Center. On the second day of an emergency, all Level 2 case management clients will be called; on the third day, all Level 1 case management clients will be called. If the power fails at the Project ABLE Office, calls will be forwarded to the senior services directors home. Captain Vern McCabe, North Portland Police Precinct, has agreed to handle any outstanding emergency that Project ABLE may face.

5. Contracting Agency Involvement (Describe support services to be provided for this project. Discuss the role of the contracting agency in the areas of fund-raising, advocacy, and provision of support services to the Center program.)

North Portland Rotary first met in 1959, and has been active in the North Portland community since that time. 1975/76 was the first year that North Portland Rotary contracted with the City of Portland to administer the North Portland Aging Services District. The intent of North Portland Rotary was to act as volunteer administrators in order to maximize service dollars for the District and to date the Rotary has not taken any monies for administrative duties. In 1976, the North Portland Rotary was instrumental in securing an agreement with St. Andrews Episcopal Church to use a newly purchased building as a senior center, the Peninsula Senior Center. Every year since that time, North Portland Rotary has made an improvement to the building. These projects have included painting the building, constructing a wheelchair ramp, purchasing furniture, and installing a new floor covering. This year, North Portland Rotary has elected to pay half the salary of the Recreational Leader in order to continue recreational services at the Peninsula Senior Center. North Portland Rotary has paid for these projects with their own resources.

North Portland Rotary is a unique sponsor in choosing to administer a social service program for senior citizens who live in the district that the Rotarians work in. Initiating a contract with the City of Portland to benefit senior citizens demonstrates North Portland Rotary's commitment to community service in a manner that few other service organizations have attempted. Individual Rotarians have lobbied with public officials on behalf of the Project.

North Portland Rotarians have recognized Project volunteers at luncheons. Rotarians have used their business contacts in the community to secure services or materials for Project ABLE. As a service organization, Rotarians have participated in specific projects with other service organizations to the benefit of Project ABLE clients. North Portland Rotary has also conducted other community projects and are involved in Rotary International student exchange programs. All the activities of North Portland Rotary reflect the philosophy of the organization, service to the community and service in business.

6. Community Participation (Describe the citizen involvement in planning this project and the ways the community will be involved in the project's operation. Describe staff, Advisory Council, and Corporate Board relationships.)

The Seniors North Committee was formed in April 1972 to establish Peninsula Project ABLE services in North Portland. The Committee has since incorporated as a non-profit organization, adopted a constitution, established relations with other community organizations, and participated in numerous community projects. Seniors North Committee advises the North Portland Rotary, and from time to time represents the Rotary's interests at the request of the Rotary. The purpose of the Seniors North Committee is to promote the well-being of senior citizens, particularly those living in North Portland, and to promote the continuation of Peninsula Project ABLE's services. In order to accomplish the purpose of the organization, the Seniors North Committee seeks to inform and enlist the support, participation and cooperation of all agencies on the local, state, and national levels interested in offering or providing services to the aging, or who have purposes similar to the group. Membership in the Seniors North Committee is open to all persons and organizations interested in the well-being of the elderly. Voluntary dues of \$1 annually are received. The Seniors North Committee Board is composed of a Chairman, Vice-Chairman, Treasurer, Secretary, 4 directors, 2 members-at-large, and a Chaplain. Regular monthly meetings are held on the second Tuesday of every month except August; election of officers are held every two years. The Seniors North Committee will be responsible for advising the North Portland Rotary of senior citizens needs and service priorities, and ways in which services can better meet the needs and priorities. The Seniors North Committee will participate in hiring and firing as described in the Personnel Policies. Seniors North Committee members serve as volunteers donating their time and resources to support their activities.

7. Coordination (Describe the coordination of 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.)

Peninsula Project ABLE will not duplicate services being provided to North Portland senior citizens by agencies having statutory responsibilities, although an advocacy role maybe taken to insure that this district's senior citizens are receiving services due them from these agencies.

Peninsula Project ABLE is involved in the following program and/or service exchanges;

North Portland Rotary provides one sedan vehicle to the Project to be used by the Driver/escort in providing special transportation.

U.S. Army Reservists provide free medical services at monthly weekend clinics. Senior Services Director.

Handyman and minor home repairs services to be provided for the costs of the materials by the Roosevelt High School VICA Club. Information and Referral Specialist and Counselors.

Monthly luncheons during the school year for 40 senior citizen participants provided by the Roosevelt High School Home Economics Department. Information and Referral Specialist and Counselors.

The Peninsula Senior Center to be used for educational and recreational events provided by St. Andrews Episcopal Church. Senior Services Director.

Yard maintenance and other special events and projects provided by the North Portland Youth Service Center. Information and Referral Specialist.

Discount groceries provided by the Senior Citizens' Grocery. Senior Services Director.

Monthly Blood Pressure Clinics provided by Multnomah County Public Health Department at the Peninsula Senior Center. Recreational Leader.

Tax Clinic for low-income senior citizens provided by the VITA Program. Information and Referral Specialist.

Peninsula Project ABLE has "Letters of Agreement" with Loaves and Fishes and Legal Aid. Senior Services Director.

North
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EXHIBIT B

BUDGETS AND ATTACHMENTS

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

a. City Support Requested

<u>III-B</u>	<u>\$40,664</u>
<u>City/County General Fund</u>	<u>40,664</u>
_____	_____
_____	_____
_____	_____
Subtotal	<u>81,328</u>
Required Match (Cash and/or Inkind)	<u>4,519</u>
Program Income	<u>60</u>
Subtotal	<u>85,907</u>

Other Resources:

Source of revenue: Ceta-Youth Cash In-Kind (one only)
 Funding source: III-B
 Service category: Information/Referral
 Administration: _____
 Service: 392.00
 Total \$ 392.00

Source of revenue: Ceta-Youth Cash In-Kind
 Funding source: General Fund
 Service category: Case Management Level 1
 Administration: 290.08
 Service: _____
 Total \$ 290.08

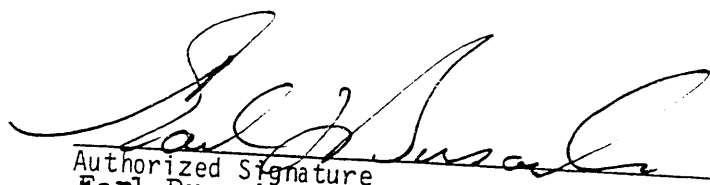
	<u>Cash</u>	<u>In-Kind</u>	
Source of revenue:	<u>Ceta-Youth</u>	<input type="checkbox"/> / <input checked="" type="checkbox"/>	
Funding source:	<u>General Fund</u>		
Service category:	<u>Case Management Level 2</u>		
Administration:	<u>101.92</u>		
Service:	<u> </u>		
Total:			<u>\$ 101.92</u>
Source of revenue:	<u>North Portland</u>	<input checked="" type="checkbox"/> / <input type="checkbox"/>	
	<u>Rotary, Inc.</u>		
Funding source:	<u>III-B</u>		
Service category:	<u>Immediate Transportation/Repair and Maintenance</u>		
Administration:	<u> </u>		
Service:	<u>100.00</u>		
Total:			<u>\$ 100.00</u>
Source of revenue:	<u>North Portland</u>	<input type="checkbox"/> / <input checked="" type="checkbox"/>	
	<u>Rotary, Inc.</u>		
Funding source:	<u>General Fund</u>		
Service category:	<u>Case Management Level 1/Christmas Project</u>		
Administration:	<u> </u>		
Service:	<u>399.60</u>		
Total:			<u>\$ 399.60</u>
Source of revenue:	<u>North Portland</u>	<input type="checkbox"/> / <input checked="" type="checkbox"/>	
	<u>Rotary, Inc.</u>		
Funding source:	<u>General Fund</u>		
Service category:	<u>Case Management Level 2/Christmas Project</u>		
Administration:	<u> </u>		
Service:	<u>140.40</u>		
Total:			<u>\$ 140.40</u>
Subtotal:			<u>\$ 1424.00</u>
TOTAL			<u>\$ 87331.00</u>

b. FUNDING STATEMENT: (Briefly describe the duration of funding from each source of match and other resources listed above)

Match: Volunteers, 12 months
Utilities, 12 months
Operating Supplies, 12 months
Use of vehicle, 12 months
Other Resources: Ceta Youth, 2 months
Repair and Maintenance, as needed
Christmas Project, one day

Statement of Certification

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



Authorized Signature
Earl Busacker, President

Date May 1, 1981

North Aging District Services
 North Portland Rotary, Inc.
 7-1-81 to 6-30-82

APPROPRIATION UNIT
 LINE ITEM WORKSHEET

No. 81/82
 151820

Code	Object Title	Title III-B Infor&Refer Admin	Title III-B Infor&Refer Services	Title III-B Indiv.Asses Admin	Title III-B Indiv.Asses Services	Title III-B Outreach Admin
110	Full-Time Employees	974	12746	156	2032	156
120	Part-Time Employees					
130	Federal Program Enroll fees					
140	Overtime					
150	Premium Pay					
170	Benefits	233	2083	9	374	9
190	Less-Labor Turnover					
100	Total Personal Services	1207	14829	165	2406	165
210	Professional Services	198		45		45
220	Utilities					
230	Equipment Rental					
240	Repair & Maintenance					
260	Miscellaneous Services					
310	Office Supplies		22			
320	Operating Supplies					
330	Repair & Maint. Supplies					
340	Minor Equipment & Tools					
350	Clothing & Uniforms					
380	Other Commodities- External					
410	Education					
420	Local Travel		120		62	
430	Out-of-Town Travel					
440	Space Rental	21	392	7	130	7
450	Interest					
460	Refunds					
470	Retirement System Payments					
490	Miscellaneous					
510	Fleet Services					
520	Printing Services					
530	Distribution Services					
540	Electronic Services					
550	Data Processing Services					
560	Insurance	349		79		79
570	Telephone Services	62	1168	6	117	6
580	Intra-Fund Services					
590	Other Services-Internal					
200- 500	Total Materials & Services	630	1702	137	309	137
610	Land					
620	Buildings					
630	Improvements					
640	Furniture & Equipment					
600	Total Capital Outlay					
700	Other					
	TOTAL	1837	16531	302	2715	302

North Aging District Services
 North Portland Rotary, Inc.
 7-1-81 to 6-30-82

APPROPRIATION UNIT
 LINE ITEM WORKSHEET

151820

Code	Object Title	Title III-B Outreach Services	Title III-B Education Admin	Title III-B Education Service	Title III-B Imm.Trans. Admin	Title III-B Imm.Trans. Service
110	Full-Time Employees	2032	462	4125	436	3424
120	Part-Time Employees					
130	Federal Program Enrollees					
140	Overtime					
150	Premium Pay					
170	Benefits	374	115	909	108	1262
190	Loss-Labor Turnover					
100	Total Personal Services	2406	577	5034	544	4686
210	Professional Services					
220	Utilities					
230	Equipment Rental					
240	Repair & Maintenance					
260	Miscellaneous Services					
310	Office Supplies					
320	Operating Supplies					
330	Repair & Maint. Supplies					
340	Minor Equipment & Tools					1565
350	Clothing & Uniforms					
380	Other Commodities-External					
410	Education					
420	Local Travel	62				
430	Out-of-Town Travel					
440	Space Rental	130				
450	Interest					
460	Refunds					
470	Retirement System Payments					
490	Miscellaneous					
510	Fleet Services					
520	Printing Services					
530	Distribution Services					
540	Electronic Services					
560	Data Processing Services					
560	Insurance					
570	Telephone Services	117	17	314	111	216
580	IntraFund Services					
590	Other Services-Internal					
200- 500	Total Materials & Services	309	17	314	774	1781
610	Land					
620	Buildings					
630	Improvements					
640	Furniture & Equipment					
600	Total Capital Outlay					
700	Other					
	TOTAL	2715	594	5348	718	6467

North Aging District Services
 North Portland Rotary, Inc.
 7-1-81 to 6-30-82

APPROPRIATION UNIT
 LINE ITEM WORKSHEET

No. 81/82
 151820

Code	Object Title	Title III-B Counseling Admin	Title III-B Counseling Service	City/Cnty GF Counseling Service	City/Cnty GF Case Mngmt I Admin	City/Cnty GF Case Mgmt I Service
110	Full-Time Employees	614	55			
120	Part-Time Employees			7344	1039	17251
130	Federal Program Enrollees					
140	Overtime					
150	Premium Pay					
170	Benefits	109	1300			
190	Less-Labor Turnover				446	2789
100	Total Personal Services	723	1355	7344	1485	20040
210	Professional Services	108				
220	Utilities				326	
230	Equipment Rental					
240	Repair & Maintenance					
260	Miscellaneous Services					
310	Office Supplies					
320	Operating Supplies		20			43
330	Repair & Maint. Supplies					
340	Minor Equipment & Tools					
350	Clothing & Uniforms					
380	Other Commodities-External					
400	Education					
410	Local Travel					
420	Out-of-Town Travel		196			581
430	Space Rental	21	392			
450	Interest				61	1160
460	Refunds					
470	Retirement System Payments					
490	Miscellaneous					
510	Fleet Services					
520	Printing Services					
530	Distribution Services					
540	Electronic Services					
550	Data Processing Services					
560	Insurance	190				
570	Telephone Services	6	124		575	
580	Intra-Fund Services				19	367
590	Other Services-Internal					
200- 500	Total Materials & Services	325	732	0	981	2151
610	Land					
620	Buildings					
630	Improvements					
640	Furniture & Equipment					
600	Total Capital Outlay					
700	Other					
	TOTAL	1048	2087	7344	2466	22191

North Aging District Services
 North Portland Rotary, Inc.
 7-1-81 to 6-30-82

APPROPRIATION UNIT
 LINE ITEM WORKSHEET

151820

Code	Object Title	City/Cnty GF Case Mgmt II Admin	City/Cnty GF Case Mgmt II Service	Total City Support	InKind Match Education Admin	InKind Match Education Service
110	Full-Time Employees					
120	Part-Time Employees	365	6061	59272	734	1637
130	Federal Program Enrollees					
140	Overtime					
150	Premium Pay					
170	Benefits	156	980	11256		
190	Less-Labor Turnover					0
100	Total Personal Services	521	7041	70528	734	1637
210	Professional Services	115		900		
220	Utilities					
230	Equipment Rental				100	400
240	Repair & Maintenance					
260	Miscellaneous Services					
310	Office Supplies					
320	Operating Supplies		15	100		
330	Repair & Maint. Supplies			1565		
340	Minor Equipment & Tools					600
350	Clothing & Uniforms					
380	Other Commodities-External					
410	Education					
20	Local Travel					
430	Out-of-Town Travel		204	1225		
440	Space Rental	21	408	2750		
450	Interest					
460	Refunds					
470	Retirement System Payments					
490	Miscellaneous					
510	Fleet Services					
520	Printing Services					
530	Distribution Services					
540	Electronic Services					
550	Data Processing Services					
560	Insurance	202		1585		
570	Telephone Services	7	129	2675		
580	Intra-Fund Services					
590	Other Services-Internal					
200- 500	Total Materials & Services	345	756	10800	100	1000
610	Land					
620	Buildings					
630	Improvements					
640	Furniture & Equipment					
600	Total Capital Outlay					
700	Other					
	TOTAL	866	7797	81328	884	2637

North Aging District Services
 North Portland Rotary, Inc.
 7-1-81 to 6-30-82

APPROPRIATION UNIT
 LINE ITEM WORKSHEET

151820

Code	Object Title	InKind Match Imm. Trans Service	TOTAL MATCH	Prog. Inc. Education Service	Prog. Inc. Imm. Trans Service	TOTAL PROG INCOME
110	Full-Time Employees		2350			
120	Part-Time Employees					
130	Federal Program Enrollees					
140	Overtime					
150	Premium Pay					
170	Benefits		71			
190	Less-Labor Turnover					
100	Total Personal Services		2421			
210	Professional Services					
220	Utilities		500			
230	Equipment Rental					
240	Repair & Maintenance					
260	Miscellaneous Services				30	30
310	Office Supplies					
320	Operating Supplies		600			
330	Repair & Maint. Supplies			30		30
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					
490	Miscellaneous	998	998			
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	Total Materials & Services	998	2098	30	30	60
610	Land					
620	Buildings					
630	Improvements					
640	Furniture & Equipment					
600	Total Capital Outlay					
700	Other					
	TOTAL	998	4519	30	30	60

Code	Object Title	Other Resources	Total Contract			
110	Full-Time Employees	713	62335			
120	Part-Time Employees					
130	Federal Program Enrollees					
140	Overtime					
150	Premium Pay					
170	Benefits	71	11398			
190	Less-Labor Turnover					
100	Total Personal Services	784	73733			
210	Professional Services		900			
220	Utilities		500			
230	Equipment Rental					
240	Repair & Maintenance	100	130			
260	Miscellaneous Services					
310	Office Supplies		100			
320	Operating Supplies	540	2735			
330	Repair & Maint. Supplies					
340	Minor Equipment & Tools					
350	Clothing & Uniforms					
380	Other Commodities-External					
410	Education					
420	Local Travel		1225			
430	Out-of-Town Travel					
440	Space Rental		2750			
450	Interest					
460	Refunds					
470	Retirement System Payments					
490	Miscellaneous					
510	Fleet Services					
520	Printing Services					
530	Distribution Services					
540	Electronic Services					
550	Data Processing Services					
560	Insurance		1585			
570	Telephone Services		2675			
580	Intra-Fund Services					
590	Other Services-Internal		998			
200-500	Total Materials & Services	640	13598			
610	Land					
620	Buildings					
630	Improvements					
640	Furniture & Equipment					
600	Total Capital Outlay					
700	Other					
	TOTAL	1424	87331			

CONTRACT BUDGET JUSTIFICATION

151820

PERSONNEL

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary Inc.

Infor & Refer/Services
Service Category (if applicable)

FUNDING SOURCE III-B

(A) Number of Persons	(B) Position or Title	(C) Monthly Salary Rate (Full-time equivalent)	(D) % of time on Project	(E) Number of Months on Project	(F) Cost (A x C x D x E)
1	Infor/Referral	896.67*/5.15	98	12	10559
1	Sen Ser Director	1233.33/7.09	15	12	2187
	*Hourly Wage				
SUB-TOTAL, PERSONNEL				12746	
* % FRINGE BENEFITS				2083	
TOTAL, PERSONNEL				14829	

* Indicates fringe benefits as a percent of 'Sub-Total, Personnel'

CONTRACT BUDGET JUSTIFICATION

151820

PERSONNEL

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary Inc.

Indiv. Needs Assess/Admin

FUNDING SOURCE III-B

Service Category (if applicable)

(A) Number of Persons	(B) Position or Title	(C) Monthly Salary Rate (Full-time equivalent)	(D) % of time on Project	(E) Number of Months on Project	(F) Cost (A x C x D x E)
1	Sen.Ser. Director	1233.33*/7.09	1	12	156
*Hourly	Wage				

SUB-TOTAL, PERSONNEL 156

* % FRINGE BENEFITS 9

TOTAL, PERSONNEL 165

* Indicates fringe benefits as a percent of 'Sub-total, Personnel'

CONTRACT BUDGET JUSTIFICATION

151820

PERSONNEL

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary Inc.

Indiv. Needs Assess/Services
Service Category (if applicable)

FUNDING SOURCE III-B

(A) Number of Persons	(B) Position or Title	(C) Monthly Salary Rate (Full-time equivalent)	(D) % of time on Project	(E) Number of Months on Project	(F) Cost (A x C x D x E)
1	Counselor	950.58*/5.46	5	12	570
1(*)	Counselor	570.08/5.46	3	12	342
1	Counselor	893.17/5.13	5	12	536
1	Sen.Ser. Director	1233.33/7.09	4	12	584
	*Hourly Wage				
	(*)Part-time worker paid by contract				
SUB-TOTAL, PERSONNEL				2032	
* % FRINGE BENEFITS				374	
TOTAL, PERSONNEL				2406	

* Indicates fringe benefits as a percent of 'Sub-total, Personnel'

CONTRACT BUDGET JUSTIFICATION

151820

PERSONNEL

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE- North Aging District Services

AGENCY North Portland Rotary Inc.

Outreach/Admin
Service Category (if applicable)

FUNDING SOURCE III-B

(A) Number of Persons	(B) Position or Title	(C) Monthly Salary Rate (Full-time equivalent)	(D) % of time on Project	(E) Number of Months on Project	(F) Cost (A x C x D x E)
1	SenSer Director	1233.33*/7.09	1	12	156
	*hourly Wage				
SUB-TOTAL, PERSONNEL					156
* % FRINGE BENEFITS					9
TOTAL, PERSONNEL					165

* Indicates fringe benefits as a percent of 'Sub-total, Personnel'

CONTRACT BUDGET JUSTIFICATION

151820

PERSONNEL

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary Inc

Outreach/ Services
Service Category (if applicable)

FUNDING SOURCE III-B

(A) Number of Persons	(B) Position or Title	(C) Monthly Salary Rate (Full-time equivalent)	(D) % of time on Project	(E) Number of Months on Project	(F) Cost (A x C x D x E)
1	Counselor	950.58*/5.46	5	12	570
1(*)	Counselor	570.08/5.46	5	12	342
1	Counselor	893.17/5.13	5	12	536
1	SenSer Director	1233.33/7.09	4	12	584
	*Hourly Wage				
	(*)part-time worker paid by contract				
SUB-TOTAL, PERSONNEL				2032	
* % FRINGE BENEFITS				374	
TOTAL, PERSONNEL				2406	

* Indicates fringe benefits as a percent of 'Sub-total, Personnel'

CONTRACT BUDGET JUSTIFICATION

PERSONNEL

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary Inc.

Education/ Admin
Service Category (if applicable)

FUNDING SOURCE III-B

(A) Number of Persons	(B) Position or Title	(C) Monthly Salary Rate (Full-time equivalent)	(D) % of time on Project	(E) Number of Months on Project	(F) Cost (A x C x D x E)
1(**)	Recreation Leader	135.50*/3.58	2	12	92
1	Sen Ser Director	1233.33/7.09	2.5	12	370
	*Hourly Wage				
	(**)Part-time worker paid by contract and other monies				
SUB-TOTAL, PERSONNEL					462
* % FRINGE BENEFITS					115
TOTAL, PERSONNEL					577

* Indicates fringe benefits as a percent of 'Sub-total, Personnel'

CONTRACT BUDGET JUSTIFICATION

PERSONNEL

151820

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary Inc.

Education/Services

FUNDING SOURCE III-B

Service Category (if applicable)

(A) Number of Persons	(B) Position or Title	(C) Monthly Salary Rate (Full-time equivalent)	(D) % of time on Project	(E) Number of Months on Project	(F) Cost (A x C x D x E)
1(**)	Recreational Leader	135.50*/3.58	20	12	1535
1	SenSer Director	1233.33/7.09	18	12	2590
	*Hourly Wage				
	(**)Part-time worker paid by contract and other monies				
SUB-TOTAL, PERSONNEL					4125
* % FRINGE BENEFITS					909
TOTAL, PERSONNEL					5034

* Indicates fringe benefits as a percent of 'Sub-total, Personnel'

CONTRACT BUDGET JUSTIFICATION

151820

PERSONNEL

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary Inc.

Immediate Trans/Admin
Service Category (if applicable)

FUNDING SOURCE III-B

(A) Number of Persons	(B) Position or Title	(C) Monthly Salary Rate (Full-time equivalent)	(D) % of time on Project	(E) Number of Months on Project	(F) Cost (A x C x D x E)
1	Sen. Ser. Director	1233*/7.09	2.9	12	436
	* Hourly Wages				
SUB-TOTAL, PERSONNEL					436
* % FRINGE BENEFITS					108
TOTAL, PERSONNEL					544

* Indicates fringe benefits as a percent of 'Sub-total, Personnel'

CONTRACT BUDGET JUSTIFICATION

PERSONNEL

151820

CONTRACT NO. _____
PROJECT TITLE North Aging District Services

DATE May 1, 1981

AGENCY North Portland Rotary Inc.

Immediate Trans/Services
Service Category (if applicable)

FUNDING SOURCE III-B

(A) Number of Persons	(B) Position or Title	(C) Monthly Salary Rate (Full-time equivalent)	(D) % of time on Project	(E) Number of Months on Project	(F) Cost (A x C x D x E)
1	Driver/Escort	260.00*/3.10	48	12	3120
1	Sen Ser Director	1233.33/7.09	2	12	304
	*Hourly Wages				
	(*)Part-time worker paid by contract				
SUB-TOTAL, PERSONNEL				3424	
* % FRINGE BENEFITS				1262	
TOTAL, PERSONNEL				4686	

* Indicates fringe benefits as a percent of 'Sub-total, Personnel'

CONTRACT BUDGET JUSTIFICATION

151820

PERSONNEL

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary Inc.

Counseling/Admin

Service Category (if applicable)

FUNDING SOURCE III-B

(A) Number of Persons	(B) Position or Title	(C) Monthly Salary Rate (Full-time equivalent)	(D) % of time on Project	(E) Number of Months on Project	(F) Cost (A x C x D x E)
1	Sen. Ser. Director	1233.33*/7.09	4	12	614
	*Hourly Wage				
				SUB-TOTAL, PERSONNEL	614
				* % FRINGE BENEFITS	109
				TOTAL, PERSONNEL	723

* Indicates fringe benefits as a percent of 'Sub-total, Personnel'

CONTRACT BUDGET JUSTIFICATION

151820

PERSONNEL

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary Inc.

Counseling/Services
Service Category (if applicable)

FUNDING SOURCE III-B

NOTE: See Counseling Serv/Gen. Fund

(A) Number of Persons	(B) Position or Title	(C) Monthly Salary Rate (Full-time equivalent)	(D) % of time on Project	(E) Number of Months on Project	(F) Cost (A x C x D x E)
1	Counselor	950.58*/5.46	.004	12	55
	*Hourly Wage				
SUB-TOTAL, PERSONNEL					55
* % FRINGE BENEFITS					1300
TOTAL, PERSONNEL					1355

* Indicates fringe benefits as a percent of 'Sub-total, Personnel'

CONTRACT BUDGET JUSTIFICATION

151820

PERSONNEL

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary Inc.

Counseling/Services

FUNDING SOURCE General Fund

Service Category (if applicable)

NOTE: See Counseling Serv/III-B

(A) Number of Persons	(B) Position or Title	(C) Monthly Salary Rate (Full-time equivalent)	(D) % of time on Project	(E) Number of Months on Project	(F) Cost (A x C x D x E)
1	Counselor	950.58*/5.46	19.6	12	2226
1(*)	Counselor	570.08/5.46	12	12	1368
1	Counselor	893.17/5.13	20	12	2144
1	Sen. Ser. Director	1233.33/7.09	10.4	12	1606
	*Hourly Wage				
	(*) Part-time worker paid by contract				

SUB-TOTAL, PERSONNEL		7344
* % FRINGE BENEFITS		Ø
TOTAL, PERSONNEL		7344

* Indicates fringe benefits as a percent of 'Sub-total, Personnel'

CONTRACT BUDGET JUSTIFICATION

151820

PERSONNEL

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary Inc.

Case Manage/Level I/Admin
Service Category (if applicable)

FUNDING SOURCE General Fund

(A) Number of Persons	(B) Position or Title	(C) Monthly Salary Rate (Full-time equivalent)	(D) % of time on Project	(E) Number of Months on Project	(F) Cost (A x C x D x E)
1	Sen. Ser. Director	1233.33*/7.09	7	12	1039
	*Hourly Wages				
SUB-TOTAL, PERSONNEL				1039	
* % FRINGE BENEFITS				446	
TOTAL, PERSONNEL				1485	

* Indicates fringe benefits as a percent of 'Sub-total, Personnel'

CONTRACT BUDGET JUSTIFICATION

151820

PERSONNEL

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary Inc.

Case Manage/Level 1/Services
Service Category (if applicable)

FUNDING SOURCE General Fund

(A) Number of Persons	(B) Position or Title	(C) Monthly Salary Rate (Full-time equivalent)	(D) % of time on Project	(E) Number of Months on Project	(F) Cost (A x C x D x E)
1	Counselor	950.58*/5.46	52	12	5909
1(*)	Counselor	570.08/5.46	31	12	3544
1	Counselor	893.17/5.13	52	12	5552
1	Sen Ser Director	1233.33/7.09	15	12	2246
	*Hourly Wages				
	(*) Part-Time worker paid by contract				
SUB-TOTAL, PERSONNEL				17,251	
* % FRINGE BENEFITS				2,789	
TOTAL, PERSONNEL				20,040	

* Indicates fringe benefits as a percent of 'Sub-total, Personnel'

CONTRACT BUDGET JUSTIFICATION

151820

PERSONNEL

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary Inc.

Case Manage/Level 2/Admin

Service Category (if applicable)

FUNDING SOURCE General Fund

(A) Number of Persons	(B) Position or Title	(C) Monthly Salary Rate (Full-time equivalent)	(D) % of time on Project	(E) Number of Months on Project	(F) Cost (A x C x D x E)
1	Sen Ser Direct	1233.33*/7.09	2.4	12	365
	*Hourly Wages				
SUB-TOTAL, PERSONNEL					365
* % FRINGE BENEFITS					156
TOTAL, PERSONNEL					521

* Indicates fringe benefits as a percent of 'Sub-total, Personnel'

CONTRACT BUDGET JUSTIFICATION

151820

PERSONNEL

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary Inc.

Case Manage/Level 2/Services
Service Category (if applicable)

FUNDING SOURCE General Fund

(A) Number of Persons	(B) Position or Title	(C) Monthly Salary Rate (Full-time equivalent)	(D) % of time on Project	(E) Number of Months on Project	(F) Cost (A x C x D x E)
1	Counselor	950.58*/5.46	18	12	2076
1(*)	Counselor	570.08/5.46	11	12	1245
1	Counselor	893.17/5.13	18	12	1950
1	Sen Ser Director	1233.33/7.09	5.3	12	790
	*Hourly Wages				
	(*) Part-time worker paid by contract				
SUB-TOTAL, PERSONNEL					6061
* % FRINGE BENEFITS					980
TOTAL, PERSONNEL					7041

* Indicates fringe benefits as a percent of 'Sub-total, Personnel'

CONTRACT BUDGET JUSTIFICATION

151820

PERSONNEL

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary Inc.

Total City Support
Service Category (if applicable)

FUNDING SOURCE III-B and General Fund

(A) Number of Persons	(B) Position or Title	(C) Monthly Salary Rate (Full-time equivalent)	(D) % of time on Project	(E) Number of Months on Project	(F) Cost (A x C x D x E)
1	Senior Services Director	1233.33/*7.09	100	12	14,800
1	Infor/Referral	896.67/ 5.15	100	12	10,760
1	Counselor	950.58/ 5.46	100	12	11,407
1(*)	Counselor	570.08/5.46	60	12	6841
1	Counselor	893.17/5.13	100	12	10718
1(*)	Driver/Escort	260.00/3.10	48	12	3120
1(**)	Recreational Leader	135.50/3.58	22	12	1626
	* Hourly Wages				
	(*) Part-time Worker paid by contract				
	(**) Part-time Worker paid by contract and other monies				
	*** 2088 hours in contract year				
SUB-TOTAL, PERSONNEL					59,272
		.189	* % FRINGE BENEFITS	11,256	
TOTAL, PERSONNEL					70,528

* Indicates fringe benefits as a percent of 'Sub-total, Personnel'

CONTRACT BUDGET JUSTIFICATION

151820

PERSONNEL

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary, Inc.

Education - Administration
Service Category (if applicable)

FUNDING SOURCE In-kind Match

(A) Number of Persons	(B) Position or Title	(C) Monthly Salary Rate (Full-time equivalent)	(D) % of time on Project	(E) Number of Months on Project	(F) Cost (A x C x D x E)
	Volunteers	3.10*		12	784
SUB-TOTAL, PERSONNEL					784
* % FRINGE BENEFITS					N.A
TOTAL, PERSONNEL					784

* Indicates fringe benefits as a percent of 'Sub-total, Personnel'

CONTRACT BUDGET JUSTIFICATION

151820

PERSONNEL

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary, Inc.

Education Service

FUNDING SOURCE In-kind Match

Service Category (if applicable)

(A) Number of Persons	(B) Position or Title	(C) Monthly Salary Rate (Full-time equivalent)	(D) % of time on Project	(E) Number of Months on Project	(F) Cost (A x C x D x E)
	Volunteers	3.10*		12	1,637
SUB-TOTAL, PERSONNEL					1,63
* % FRINGE BENEFITS					N.A.
TOTAL, PERSONNEL					1,637

* Indicates fringe benefits as a percent of 'Sub-total, Personnel'

CONTRACT BUDGET JUSTIFICATION

151820

PERSONNEL

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary, Inc.

Total Match
Service Category (if applicable)

FUNDING SOURCE Match (in-kind)

(A) Number of Persons	(B) Position or Title	(C) Monthly Salary Rate (Full-time equivalent)	(D) % of time on Project	(E) Number of Months on Project	(F) Cost (A x C x D x E)
	Volunteers	3.10*		12	2421
SUB-TOTAL, PERSONNEL					2421
* % FRINGE BENEFITS					N.A.
TOTAL, PERSONNEL					2421

* Indicates fringe benefits as a percent of 'Sub-total, Personnel'

CONTRACT BUDGET JUSTIFICATION

151820

MATERIALS AND SERVICES

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary Inc.

I&R/Administration
Service Category (if applicable)

FUNDING SOURCE III-B

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
210	Professional Services accounting services	198	198
440	Space Rental	21	21
560	Insurance Bonding, liability, auto, theft	349	349
570	Telephone Services	62	62

CONTRACT BUDGET JUSTIFICATION
MATERIALS AND SERVICES

151820

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary Inc.

I&R/Services
Service Category (if applicable)

FUNDING SOURCE III-B

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
310	Office Supplies	22	22
420	Local Travel 18¢ mile	120	120
440	Space Rental	392	392
570	Telephone Services	1168	1168

CONTRACT BUDGET JUSTIFICATION

151820

MATERIALS AND SERVICES

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary Inc.

Individual Needs Assess
Service Category (if applicable)
Administration

FUNDING SOURCE III-B

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
210	Professional Services Accounting services	45	45
440	Space Rental	7	7
560	Insurance Bonding, auto, liability and theft	79	79
570	Telephone Services	6	6

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CONTRACT BUDGET JUSTIFICATION
MATERIALS AND SERVICES

CONTRACT NO. _____

DATE May 1, 1981PROJECT TITLE North Aging District ServicesAGENCY North Portland Rotary Inc.

Individual Needs Assess Services
Service Category (if applicable)

FUNDING SOURCE III-B

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
420	Local Travel 18¢ mile	62	62
440	Space Rental	130	130
570	Telephone Services	117	117

CONTRACT BUDGET JUSTIFICATION
MATERIALS AND SERVICES

151820

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary Inc.

Outreach/Administration
Service Category (if applicable)

FUNDING SOURCE III-B

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
210	Professional Services Accounting Services	45	45
440	Space Rental	7	7
560	Insurance Bonding, auto, liability and theft	79	79
570	Telephone Services	6	6

151820

CONTRACT BUDGET JUSTIFICATION
MATERIALS AND SERVICES

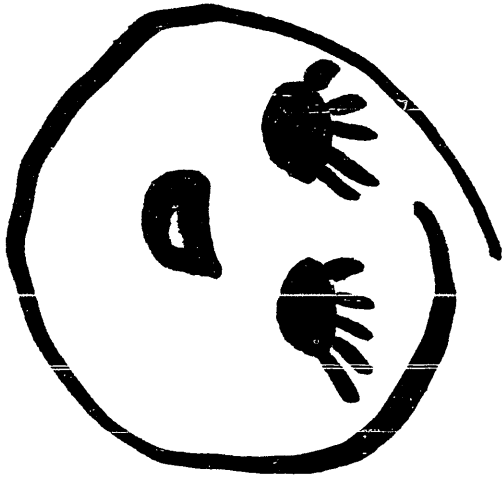
DATE May 1, 1981

CONTRACT NO. _____
PROJECT TITLE North Aging District Services
AGENCY North Portland Rotary Inc.
FUNDING SOURCE III-B

Outreach/Services
Service Category (if applicable)

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
420	Local travel 18¢ per mile	62	62
440	Space Rental	130	130
570	Telephone Services	117	117

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CONTRACT BUDGET JUSTIFICATION

151820

MATERIALS AND SERVICES

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary Inc.

Outreach/Services
Service Category (if applicable)

FUNDING SOURCE III-B

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
420	Local travel 18¢ per mile	62	62
440	Space Rental	130	130
570	Telephone Services	117	117

CONTRACT BUDGET JUSTIFICATION

151820

MATERIALS AND SERVICES

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary Inc.

Education Administration
Service Category (if applicable)

FUNDING SOURCE III-B

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
570	Telephone Services	17	17

CONTRACT BUDGET JUSTIFICATION
MATERIALS AND SERVICES

151820

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary Inc.

Education/Services
Service Category (if applicable)

FUNDING SOURCE III-B

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
570	Telephone Services	314	314

CONTRACT BUDGET JUSTIFICATION
MATERIALS AND SERVICES

151820

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary Inc.

Immediate Transportation/Administration
Service Category (if applicable)

FUNDING SOURCE III-B

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
210	Professional Services Accounting Services	63	63
560	Insurance Bonding, auto, liability and theft	111	111

CONTRACT BUDGET JUSTIFICATION

151820

MATERIALS AND SERVICES

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary Inc.

Immediate Transportation/Sevices
Service Category (if applicable)

FUNDING SOURCE III-B

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
320	Operating Supplies	1565	1565
570	Telephone Services one bell boy pager	216	216

CONTRACT BUDGET JUSTIFICATION

MATERIALS AND SERVICES

151820

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary Inc.

Counseling/Administration
Service Category (if applicable)

FUNDING SOURCE III-B

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
210	Professional Services Accounting Services	108	108
440	Space Rental	21	21
560	Insurance Bonding, auto, liability and theft	190	190
570	Telephone Services	6	6

CONTRACT BUDGET JUSTIFICATION

MATERIALS AND SERVICES

151820

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary Inc.

Counseling/Services
Service Category (if applicable)

FUNDING SOURCE III-B

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
310	Office Supplies	20	20
420	Local Travel 18¢ mile	196	196
440	Space Rental	392	392
570	Telephone Services	124	124

CONTRACT BUDGET JUSTIFICATION

151820

MATERIALS AND SERVICES

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary Inc.

Case Management/Level 1
Service Category (if applicable)
Administration

FUNDING SOURCE General Fund

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
210	Professional Services Accounting Services	326	326
440	Space Rental	61	61
560	Insurance	575	575
570	Telephone Services	19	19

CONTRACT BUDGET JUSTIFICATION

151820

MATERIALS AND SERVICES

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary Inc.

Case Management/Level 1 Services
Service Category (if applicable)

FUNDING SOURCE General Fund

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
310	Office Supplies	43	43
420	Local Travel 18¢ mile	581	581
440	Space Rental	1160	1160
570	Telephone Services	367	367

CONTRACT BUDGET JUSTIFICATION

MATERIALS AND SERVICES

151820

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary Inc.

Case Management/Level 2
 Service Category (if applicable)
 Administration

FUNDING SOURCE General Fund

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
210	Professional Services Accounting Services	115	115
440	Space Rental	21	21
560	Insurance Bonding, auto, liability and theft	202	202
570	Telephone Services	7	7

CONTRACT BUDGET JUSTIFICATION

MATERIALS AND SERVICES

151820

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary Inc.

Case Management/Level 2 services
Service Category (if applicable)

FUNDING SOURCE Genral Fund

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
310	Office Supplies	15	15
420	Local Travel 18¢ per mile	204	204
440	Space Rental	408	408
570	Telephone Services	129	129

CONTRACT BUDGET JUSTIFICATION

MATERIALS AND SERVICES

151820

CONTRACT NO. _____

DATE May 1, 1981

PROJECT NO. North Aging District Services

AGENCY North Portland Rotary, Inc.

Total City Support
Service Category (if applicable)

FUNDING SOURCE III-B and General Fund

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
210	Professional Services Accounting services	900	900
310	Office supplies	100	100
320	Operating supplies gasoline	1565	1565
420	Local travel 18¢ per mile	1225	1225
440	Space Rental	2750	2750
560	Insurance Bonding, auto, liability and theft	1585	1585
570	Telephone services one bell-boy pager 5 lines/8 instruments	2675	2675

CONTRACT BUDGET JUSTIFICATION

151820

MATERIALS AND SERVICES

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary, Inc.

Immediate Transportation/Services
Service Category (if applicable)

FUNDING SOURCE Match (in-kind)

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
490	Other services-internal Use of vehicle owned by North Portland Rotary excluding gas and insurance expenses. NOTE: Estimates of vehicle operation costs were taken from HERTZ Corp. as reprinted in the March-April, 1981 issue of <u>ARA News and Views</u> .	998	998

CONTRACT BUDGET JUSTIFICATION
MATERIALS AND SERVICES

151820

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary, Inc's

FUNDING SOURCE Match (in-kind)

Education/Services
Service Category (if applicable)

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
220	Utilities Utilities at Peninsula Senior Center being used by staff and participates of educational events.	400	400
320	Operating Supplies Materials and supplies being used by staff and participates at educational events.	600	600

151820

CONTRACT BUDGET JUSTIFICATION

MATERIALS AND SERVICES

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary, Inc.

Education/Administration
Service Category (if applicable)

FUNDING SOURCE Match (in-kind)

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
220	Utilities Utilities at Peninsula Senior Center being used by staff that is responsible for administrating educational events	100	100

CONTRACT BUDGET JUSTIFICATION

151820

MATERIALS AND SERVICES

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary, Inc.

FUNDING SOURCE Total Match (in-kind)

Total Match
Service Category (if applicable)

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
220	Utilities Utilities used at the Peninsula Senior Center by staff and participants at educational events.	500	500
320	Operating Supplies Materials and supplies being used by staff and participants at educational events.	600	600
4 90	Other services-internal Use of vehicle owned by North Portland Rotary excluding gas and insurance expenses. *NOTE: Estimates of vehicle operation costs were taken from Hertz Corp. as reprinted in the March-April, 1981 issue of <u>ARA News and Views</u> .	998	998

CONTRACT BUDGET JUSTIFICATION

MATERIALS AND SERVICES

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary, Inc.

Immediate Transportation/Services
Service Category (if applicable)

FUNDING SOURCE Program Income

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
240	Repair and Maintenance Vehicle repairs	30	30

CONTRACT BUDGET JUSTIFICATION

151820

MATERIALS AND SERVICES

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary, Inc.

Education/Services

FUNDING SOURCE Program Income

Service Category (if applicable)

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
320	Operating Supplies Materials and supplies being used by staff and participants at educational events.	30	30

CONTRACT BUDGET JUSTIFICATION

151820

MATERIALS AND SERVICES

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE North Aging District Services

AGENCY North Portland Rotary, Inc.

Total Program Income
Service Category (if applicable)

FUNDING SOURCE Total Program Income

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
240	Repair and Maintenance Vehicle repairs	30	30
320	Operating Supplies Materials and supplies being used by staff and participants at educational events.	30	30

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

North Portland Rotary, Inc., (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 effects 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.

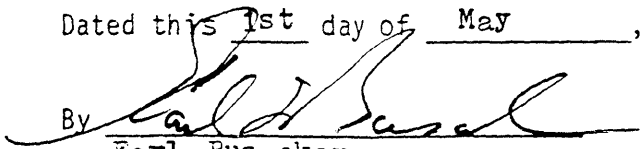
4. The Contractor shall make reasonable accommodation to the known physical or mental limitations of an otherwise qualified handicapped applicant or employee.
5. The Contractor shall not deny any employment opportunity to a qualified handicapped employee or applicant if the basis for the denial is the 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 unable 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 1st day of May, 1981.

By


Earl Busacker

Title President

7640 North Jersey, Portland, Oregon 97203

Contractor's mailing address

ASSURANCE OF COMPLIANCE
WITH THE CITY OF PORTLAND
AFFIRMATIVE ACTION PLAN

NO
81/82 151820

North Portland Rotary, Inc. (hereinafter called the "Contractor")
HEREBY AGREES THAT it will comply with the City of Portland Affirmative Action Plan as stated in City Ordinance 144724, dated November 10, 1977, and the Federal Guidelines contained in Revised Code 4 of the U. S. Department of Labor, to the end that no person who applies for employment shall, on the ground of race, color, religion, age, sex, national origin, or handicap, be excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination under any program or activity for which the Contractor receives City of Portland financial assistance; and HEREBY GIVES ASSURANCE THAT it will immediately take any measures necessary to effectuate this agreement.

The "equal employment opportunity doctrine" is more than a directive prohibiting discriminatory practices; rather, it is a doctrine that requires positive measures to assure an equal opportunity for meaningful employment of those persons who have been victims of discrimination. This doctrine extends to all areas of employment and to all relations with employees, 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 Affirmative Action Plan calls for:

1. An improvement of employment opportunities for minority group persons and women in all employee classifications.
2. An improvement of career opportunities for minority groups and women employees.
3. An increased awareness of "institutional" biases through education and training to achieve its eradication.
4. An explanation to minority group organizations of the programs, employment and training opportunities, and the qualifications required for positions in the Contractor's organization.
5. An active education program which will keep management, supervisors and employees informed of their social and civil rights and responsibilities.

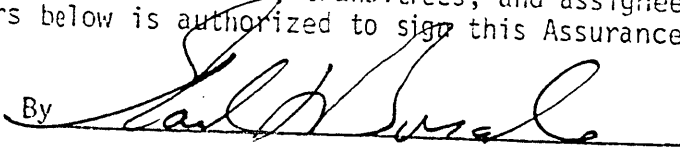
The Contractor hereby recognizes and agrees that an Assurance of Compliance with the City of Portland's Affirmative Action Plan is given in consideration of and for the purpose of obtaining any and all City contracts or other financial assistance extended after the date hereof to the Contractor by the City, including installment payments after such date on account of applications for City financial assistance which were approved before such date. The Contractor recognizes and agrees that such City financial assistance will be extended in reliance on the representations and agreements made in this Assurance, and that the City of Portland 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 May 1, 1981

7640 North Jersey, Portland
(Contractor's mailing address)

Oregon 97203

By

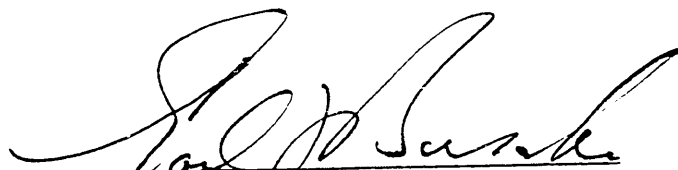

Title President

The Board of Directors of the North Aging Services District in Portland/Multnomah County has reviewed the proposal for District Center Services to be provided by Peninsula Project ABLE in the North District through contract with the City of Portland, Human Resources Bureau. Comments are attached.

X The Board of Directors approves the proposal for District Center Services.

 The Board of Directors does not approve the proposal for District Center Services for reasons listed below:

 The Board of Directors has reviewed the proposal, but has taken no action at this time.



Signature of Board Chairperson
Earl Busacker, President

April 21, 1981

Date

April 16, 1981

The District Advisory Committee of the North Aging Services District in Portland/Multnomah County has reviewed the proposal for District Center Services to be provided by Peninsula Project ABLE in the North District through contract with the City of Portland, Human Resources Bureau. Comments are attached.

XX The District Advisory Committee approves the proposal for District Center Services. Attached comments.

 The District Advisory Committee does not approve of the proposal for District Center Services for reasons listed below:

 The District Advisory Committee has reviewed the proposal, but has taken no action at this time.

 Agnes Greenwood
Signature of Chairperson
Agnes Greenwood, Chairman

 Apr - 14 - 1981
Date
April 14, 1981

Seniors North Committee; April 14, 1981
Comments regarding North Aging Services District Proposal.

At the April 14th meeting, the Seniors North Committee members voted to approve North Portland Rotary's proposal for North Aging Services for FY 81/82. In addition, the members would like the following comments to be included.

North Portland Rotary's proposal for North Portland Aging Services for FY 81/82 represents an effort to maximize service levels. Only essential material and services support is being requested. No allowance is being provided for an emergency as no monies are being requested for repair and maintenance, operating supplies, office supplies or education. The Committee is aware that this proposal is written for the same amount of contracted monies as last year, therefore precluding cost of living raises for the Peninsula Project ABLE staff. The Committee is aware that the core program is being maintained at a slightly reduced level, and that no significant increases have occurred in the last four years.

151820

EXHIBIT C
Required Reporting Forms
and
Procedures

OPEN ACCESS SERVICES FOR THE MONTH OF _____
 NORTH AGING DISTRICT SERVICES

151820

I. Information and Referral

	<u>This Month</u>	<u>YTD</u>
A. Number of simple information requests	_____	_____
B. Number of complex information requests	_____	_____
C. Number of simple referrals	_____	_____
D. Number of complex referrals	_____	_____

II. District Services

A. Outreach

Number of individuals located _____

B. Immediate Transportation

1. Number of one way rides _____
2. Number of individuals _____
3. Number of new individuals _____

C. Counseling

1. Number of hours of counseling _____
2. Number of individuals _____
3. Number of new individuals _____

D. Education

<u>Event (Topic)</u>	<u>Date</u>	<u>Total Attended</u>	<u>First Time Attended</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Number of events this month _____ YTD _____

Volunteers:

Estimated Number of 60+ volunteers _____

Estimated Number of minority volunteers _____

 Authorized Signature

 Date

AAA

Revised: 6/2/81

ONCE PRINTED, REVISED
CLIENT TRACKING SYSTEM
FORMS 101 - 102 - 103
WILL BE SENT TO CONTRACTOR

INFORMATION TALLY SHEET

AAA 211 (Revised 6/79)

Completed by: _____

Month _____

TYPE OF CONTACT

Phone:	Walk-in:	Other:	Total:

TYPE OF SERVICE PROVIDED

Info/simple:	Info/complex:	Other:

SOURCE OF CONTACT

Self:	Spouse:	Friend/Relative:	Agency:	Other:

Disposition of Request

Subject of Request	Information Only	Center Service	Other Agency	Unable to Help	TOTAL
Housing Location					
Housing Repair/Maint					
Housing Yard Work					
Social Friendly V./TR					
Social Ed/Rec					
Social Vol Act.					
Info/SU Emergency					
Info/SU Income Maint					
Info/SU Case Mngt					
Tran. Special Trans					
Tran. Escort					
In-Home Live-in					
In-Home Housekeeper					
In-Home Homemaker					
Prot/L Protective Serv					
Prot/L Legal Assist.					
Nut. Meal Prep/mow					
Nut. Shopping Asst.					
Health Medical Care					
Health Dental					
Other					
TOTAL					

151820

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)

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: _____