

REQUEST FOR WAIVER

1. _____
Name of Agency requesting waiver

2. Type of request
 New
 Review

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

4. _____
Name of Client

5. _____
CTS Case Number

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

7. Resources Investigated

Services Requested

Outcome

8. _____ Date _____ 9. _____ Date _____
Signature of Counselor Date Signature of Signature Date

DO NOT WRITE BELOW THIS LINE

10. Request is: Approved AAA OPI
Temporarily Approved AAA OPI _____ Date _____
Denied AAA OPI

11. Comments:

Signature of Reviewer Date

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Contract Agency _____
Address _____
City _____ State _____

Area Agency on Aging
Youth Service Centers
Accounting Unit
522 S. W. Fifth Ave., 8th Fl.
Portland, OR. 97204
Phone: (AAA) 248-4752 (YSC) 248-4356

Contract # _____ Contract Period: From _____ To _____

Funding Source _____ Service Category _____

Reimbursement Request for _____
month & year

CODE	OBJECT TITLE	CURRENT PERIOD REOUEST	YEAR TO DATE REQUEST	CURRENT BUDGET	BALANCE
110	Full-Time Employees				
120	Part-Time Employees				
170	Benefits				
100	Total Personnel Services				
210	Professional Services				
220	Utilities				
230	Equipment Rental				
240	Repair and Maintenance				
260	Miscellaneous Services				
310	Office Supplies				
320	Operating Supplies				
330	Repair and Maint. Supplies				
340	Minor Equipment and Tools				
350	Clothing and Uniforms				
380	Other Commodities-External				
410	Education				
420	Local Travel				
430	Out-of-Town Travel				
440	Space Rental				
490	Miscellaneous				
520	Printing Services				
550	Data Processing Services				
560	Insurance				
570	Telephone Services				
200	Total Materials & Services				
500					
620	Buildings				
630	Improvements				
640	Furniture & Equipment				
600	Total Capital Outlay				
	TOTAL				

ATTACH TO THIS REIMBURSEMENT REQUEST:
1. Supporting documentation for all costs or expenditures grouped by expenditure code number. (Attach adding machine tape to each group of supporting documents.)
REIMBURSEMENT REQUEST AND SUPPORTING DOCUMENTS ARE TO BE SUBMITTED TO THE CITY NO LATER THAN THE FIFTEENTH WORKING DAY FOLLOWING MONTH END.

I certify that the information pertaining to this request is true and complete to the best of my knowledge.

Signed _____ Date Signed _____
Title _____ Phone _____



CONTRACTOR RECORD OF NON-CONSUMABLE SUPPLIES PURCHASED
 (Items with a minimum value of \$25.00 per item and a maximum value of \$200.00 per item)

DATE OF PURCHASE	NUMBER OF ITEMS	DESCRIPTION	VENDOR AND INVOICE NUMBER	UNIT COST	TOTAL COST

Authorized Signature _____

Title _____

Date Signed _____

Phone Number _____

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 Revised 6/2/81

CONTRACTOR RECORD OF NON-CONSUMABLE SUPPLIES PURCHASED
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Authorized Signature _____

Title _____

Date Signed _____

Phone Number _____

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CITY OF PORTLAND/HUMAN RESOURCES BUREAU
SOCIAL SERVICES DIVISION
CONTRACT REIMBURSEMENT PROCEDURES

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1. Reports are due monthly on the fifteenth (15th) working day following the end of the month. Reimbursement request shall be mailed directly to the Accounting Unit:

Human Resources Bureau
Social Services Division
Accounting Unit
522 S.W. Fifth Ave., 8th Floor
Yeon Building
Portland, Oregon 97204
2. Reports not received by the deadline shall not be processed until the next month. This will result in a delay in payment.
3. City forms must be used. If additional forms are needed, please contact the Accounting Unit (248-4752).
4. Materials to be submitted each month are as follows:
 - a) A separate Reimbursement Request Form for each funding source and each service category requiring City reimbursement as included in the approved contract budget.

e.g. -- I & R -- III-B
Admin. -- OPI
Admin. -- General Fund
Meals -- III-C-1
General Fund
Other
 - b) A Reimbursement Request Form for Required Match, as included in the approved budget.
 - c) A Reimbursement Form showing Project Income/Contributions collected.
 - d) A Reimbursement Form showing total City reimbursement.
 - e) Supporting documentation showing proof of payment (attached to respective Reimbursement Request Forms). This may include:

copies of checks
copies of bills
payroll register
etc.
5. Supporting documentation is to be attached to each request form, including the Required Match (copies of documentation are not necessary for the Total City Reimbursement).

For each request form, documentation is to be grouped by line item. (Attach adding machine tape to each group of supporting documents.)

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Please Note: For purposes of fiscal reporting, Match included in the contract requires the same documentation as City Support requested.

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6. If a piece of documentation is applicable to more than one funding source (or match), write on the supporting documentation how much is to be applied to each funding source/service category.
7. The "indirect cost" line item may be used to cover any costs incurred in support of the services included in the contract. Documentation/proof of payment must be submitted for each reimbursement requested.
8. Grant or Agency policy requires that expenditures be reported in dollars and cents. *DO NOT ROUND TO THE NEAREST DOLLAR!*
9. Reimbursement requests must be typed or written in ink.
10. Reimbursement Request Forms must be signed in ink by an authorized person designated by the Agency. Each agency must submit to the City the names of all persons authorized to sign these reports. The Agency is responsible for notifying the City in writing of any changes in authorized signatures.
11. The reimbursement request must be made against the current authorized contract. Each agency is responsible for notifying appropriate personnel of budget changes.
12. Incomplete or incorrect Reimbursement Request Forms will be returned to the Contractor for completion or correction.
13. Match expenditures will be analyzed quarterly as part of the monitoring procedures. Corrective action plans will be developed if necessary to assure contract compliance.

Corrective action may include: withholding of funds, suspension, or termination of the contract.

If match is not produced in accordance with the approved contract by the third (3rd) quarter of the budget year, the City will reduce its contribution to maintain the established ratio of shared costs. (For AAA District Centers, this ratio is a minimum of 90/10 City/Agency share for Discretionary Services. For other contracts, the level of required match has been negotiated.)

14. Upon receipt of completed reimbursement forms, the Accounting Unit staff reviews the request for accuracy and compliance with the approved budget, prepares payment authorization, and submits the reimbursement package to the Program staff.
15. Program Staff reviews the package and signs off, if request complies with regard to appropriate service delivery. Reimbursement request will be held until Program reports are received.
16. Principal Accountant reviews the package, approves payment, and forwards the package to Accounts Payable at City Hall.

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17. Accounts Payable reviews the package, approves payment, and processes the package for the computer to fill out the warrant (check). Computer runs are made every Tuesday and Thursday evenings.
 18. Checks are returned to Accounts Payable for verification of computer run.
 19. The computer run is forwarded to the Auditor's Office for auditing and release (mailing) of the warrant.
 20. Total estimated turnaround time is two weeks from the time a completed package leaves the Human Resources Bureau. HRB staff can usually complete its work within two days, if the requests are complete and correct, and program reports have been received.
 21. In the event of an emergency or other unusual circumstances, as approved by the Principal Accountant, a manual warrant may be issued within 72 hours. A manual warrant process will not be utilized on a regular basis.

We hope that these procedures will clarify what is expected of Agency staff in the filling out and processing of these documents. If you have any questions or need further information, please feel free to call the Accounting Unit or Social Services Contract Management staff at 248-4752.

PROCEDURES FOR CONTRACT MODIFICIATIONS

WHY?

Contract modifications are required in the following situations:

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

HOW?

Contracts may be modified in 3 ways:

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

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

PROCEDURE:

A. Initiated by City:

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

- 2. City staff shall be responsible for obtaining necessary materials from the Contractor or shall prepare revised materials (to include revised contract or project applications pages) and amendment form, as necessary.
- 3. Contractor shall review material and indicate approval formally or informally.
- 4. If an Ordinance is required:

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

- 5. If change order procedure is utilized:

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

B. Initiated by Contractor:

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

2. The Contractor shall prepare revised project application pages as follows:

a. BUDGET CHANGES

(1) Budget Worksheet

The budget worksheet must include the following columns for each funding source to be modified:

- current
- + or -
- revised

If the contract includes a funding source which is not to be modified, a column must be included for this current breakdown.

If the contract includes more than one funding source, the budget worksheet must also include columns for the following:

- current total
- total + or - (omit if only 1 funding source changes)
- revised total

The budget worksheet must include the name of the contract agency and the contract number in the upper left hand corner.

The budget worksheet must include the date of the revision in the lower right hand corner (this date should correspond with the date of the letter requesting the modification).

(SEE SAMPLE)

(2) Budget Justification Sheets

A full set of original budget justification sheets must be submitted, showing the total justification as revised. It is not necessary to show + or - on the justification sheets.

The budget justification forms should be consistent with the budget worksheet columns for the revised funding for each source and for the revised total.

Even if a budget justification sheet does not change, a new original must be prepared (e.g. pink sheet, typed original) to meet the contract requirements of the City Auditor's office.

Each budget justification sheet must be completed in full:

DATE - date of revision request (put this new date even if no changes were made on a particular page.

PROJECT NUMBER - contract number assigned by the City.

PROJECT TITLE - name of agency and service (if there are multiple contracts with the Human Resources Bureau e.g. PACT Senior Service Center).

(3) Miscellaneous Comments on Budget Changes

All changes shown on the budget worksheet or the budget justification pages should be addressed in the letter requesting the modification.

A modification is not required for any line item changes in materials and services in which that line will not be over-expended by 5% of the line item or \$1,000, whichever is less. Formal modification is not required for lines which will be underexpended.

e.g., if line 420 in the contract is \$1,000 and if there is an expected overspending of \$48, a contract modification is not required because \$48 is less than 5% of \$1,000.

If this \$48 will come from line 310 office supplies, no change is required because you will simply underspend line 310 by \$48.

Any changes in staff positions (increase in salary, change in % of time or number of months on project) requires a modification. A modification is not necessary if an individual is being paid at a lower rate of pay for a given position.

If an authorized position is to be filled by a different person, please notify the City accountant to assist in speedy processing of your invoices. A contract modification is not required.

b. SERVICE CHANGES

- (1) OBJECTIVES - (Project Narratives, Section 3)
A revised objective section should be submitted showing the revised number or type of services to be provided or the revised period in which services will be provided.

(The need for these changes and the impact should be discussed in the letter requesting the modification).

- (2) ACTIVITIES - (Project Narrative, Section 4)

Revised activities pages must be submitted only if changes are made. These activity pages will be used as a basis for monitoring the provision of services, so they should reflect current practices and procedures.

c. OTHER PROGRAM OR MANAGEMENT CHANGES

Other program or management changes will be handled on a case by case basis. Consult the City Staff responsible for contract development for specific requirements.

3. Contractor shall submit letter and revised pages as described above to Human Resources Bureau Unit Director.
4. Social Service Unit staff shall review the request for completeness and impact and shall make a determination about which modification procedure shall be utilized.
 - a. If Unit Staff supports the requested change and if an Ordinance is required, City Staff shall prepare the contract amendment prepare the ordinance and complete the regular Human Resources Bureau ordinance review process. If authorized by City Council, the Contractor shall sign 3 official copies and return to the City for City signatures and processing. A signed copy will be returned to the Contractor.
 - b. If unit staff supports the request and if a change order is to be used, City staff shall prepare the change order.

The contract change order along with the letter of request and modified pages shall be submitted for review and approval to our Accountant, Manager of Social Services, Human Resources Bureau Executive Director and the Commissioner-in-Charge.

If approved, the original change order shall be filed in the City Auditor's Office. Copies shall be provided to the Contractor, the Fiscal Unit and the responsible Program Unit.

The Contract change order becomes effective when all City signatures have been obtained.

- c. If Unit Staff does not support the request, the Contractor shall be notified. The request may be denied or additional information or documentation may be requested.

SCHEDULE OF MODIFICATIONS

Contract modifications will be accepted within 30 days of receipt of completed quarterly progress reports or at other times as directed or approved by the responsible Program Unit.

CONTRACT FOR SERVICES

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SECTION I: PARTIES TO THE CONTRACT

CITY OF PORTLAND ("City"), City Hall, 1220 S. W. Fifth Avenue, Portland, Oregon 97204, and NEIGHBORHOOD HOUSE, INC. ("Contractor"), 029 S. W. Hamilton, Portland, Oregon 97201.

SECTION II: CONTRACT SUMMARY

Contractor agrees to provide information, referral, case management, and support services to elderly residents in the Southwest Senior Service District in Portland/Multnomah County and further agrees that the total cost shall not exceed the sum of \$55,165.

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 (\$3,100), 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:

- 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 \$55,165.
- B. An advance shall be made to cover the cost of the Contractor's initial expenses for operation, not to exceed the sum of \$9,194, upon receipt of a written request from the Contractor.

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- C. The additional amounts due after the initial advance shall be reimbursed upon receipt of the required ACCOUNTING REPORT FORMS (refer to Exhibit C), the original with 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.

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- 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 ongoing 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

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 Emma E. Haplum
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

1. Project Title

Southwest Aging District Services

2. Type of Application (check one) New Continuing

3. Applicant Agency:

Name Neighborhood House, Inc.

Address 029 SW Hamilton

Portland, OR 97201

Phone Number 226-3251

Project Director Diane Bunn

Official Authorized to Bind Agency Dennis Powell - President, Board of Directors

Financial Officer Susan Christensen, Bookkeeper

4. Contract Period: From July 1-81 To June 30-82

5. Budget Period: From July 1-81 To June 30-82

6. City Support Requested \$55,165.00

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.)

Statement of Problem

Elderly persons often experience a wide array of problems related to the physical and financial decline associated with old age in this society. The comprehensive aging plan cites local and national studies which show that elderly individuals who are older, poorer, and more socially isolated tend to be a higher risk of institutionalization than the general aging population. Federal guidelines state that special emphasis should be directed towards the needs of low-income and minority elderly persons.

A comprehensive array of services is needed to increase access to available services and resources, increase opportunities for meaningful community involvement and to provide direct support to individuals in their own homes, where gaps in available community services exist.

Project Goal

To insure reasonably convenient access to information and referral services and social contact opportunities for all older persons and to provide supportive services within the community to maintain independent living situations for mentally and physically frail elderly persons in the contracted service area.

Strategies for Delivering Services

The Senior Adult Program at Neighborhood House, Inc. is a contracted project of the Bureau of Human Resources Social Services Division. Service delivery is based on a Neighborhood Development approach. Task force groups, community volunteers, natural neighbors, and the Southwest Advisory Committee on Aging are used to insure that community needs and desires are reflected in program planning and that supportive services are available to informal service providers.

Under the direction of the Executive Director and the Program Director, the staff consists of a Project Director, two full time and one ½ time counselors, an Information and Referral Specialist, practicum students and volunteers depending on job role, in counseling and supportive services, outreach, advocacy, community coordination, and program administration. The staff is involved in training sessions. The services provided by the program under AAA contract include: information and referral, needs assessments, case management, level 1 and 2, outreach, escort, transportation (immediate and flexible), friendly visiting, supervision of chore/home maintenance.

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Neighborhood House, Inc.

Service Area, Target Population and Eligibility Criteria for Services:

(Describe the service area to be covered by this project and the target population for each service to be provided. Explain how each target population will be identified. State the eligibility criteria to be utilized for each service provided and the method for appeal or exception).

Service Area: Neighborhood House, Inc. will provide services to elderly residents in Southwest Portland in the following census tracts: 58, 59, 60.01, 60.02, 63, 64, 65.02, 66.01, 67.01, 67.02, 68.01, 68.02. 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/month 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

OBJECTIVE

<p>2. Increase knowledge of services and resources for elderly residents by providing information (simple)* and information (complex)* services in response to 1530 requests for information and assistance during the period July 1, 1981 - June 30, 1982.</p>	<p>Number of information (simple) services provided. Number of information (complex) services provided.</p>	<p>1. Maintain personnel to provide an information service. Ongoing - Project Director - 1& FTE</p> <p>2. Provide staff direction/supervision, develop job descriptions, and work programs, develop a training program and evaluate staff. Ongoing - Project Director - 1& FTE</p> <p>3. Maintain, in conjunction with Tri-County Community Council Resource File, an up-to-date file on services and resources available to older adults. Monthly - I&R Specialist - 2.5& FTE</p> <p>4. Provide a communication center whereby individuals may inquire about and receive information on services and resources available to older adults. Ongoing - I&R Specialist - 20& FTE</p> <p>5. Provide written materials to community agencies and individuals informing them of services available to older adults. Ongoing - I&R Specialist - 10& FTE</p> <p>6. Provide reports and maintain records on information services to project administration. Monthly - I&R Specialist - 7.5& FTE</p> <p>7. Monitor information service to ensure contract compliance and quality. Monthly - Project Director - 1& FTE</p>
<p>* 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).</p>		

PERFORMANCE INDICATORS

PROGRAM ELEMENTS/STAFFING PATTERNS

OBJECTIVE

<p>3. Increase Access to needed services among elderly residents through the provision of referral (simple) * and referral (complex)* in response to 332 requests for the period July 1, 1981 - June 30, 1982.</p>	<p>Number of referrals (simple) services provided. Number of referrals (complex) services provided.</p>	<p>1. Provide personnel to provide referral service. Ongoing - Project Director - 2% FTE</p> <p>2. Provide staff direction/supervision, develop job descriptions and work programs, develop a training program, and evaluate staff referral personnel. Ongoing - Project Director - 1% FTE</p> <p>3. Accept referrals from agencies, individuals, and other agency staff for older adults in need of referral services. Ongoing - I&R Specialist 15% FTE</p> <p>4. Implement the referrals services by making appropriate referrals to service providing agencies, including advocacy and follow-up to insure delivery. Ongoing - I&R Specialist - 28% FTE</p> <p>5. Provide reports and maintain records on referral services to project administration. Monthly - I&R Specialist - 10% FTE</p> <p>6. Monitor referral service to insure contract compliance and quality service. Monthly - Project Director - 1% FTE</p>
<p>* 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).</p>		

PROGRAM ELEMENTS/STAFFING PATTERNS

PERFORMANCE INDICATORS

OBJECTIVE

4. Improve access of all older people to services and community resources by the provision of a needs assessment in their homes of 42 unduplicated older people during the period of July 1, 1981 through June 30, 1982.

Number of assessments made for non-case management clients.
Number of unduplicated individuals receiving services.

- 1. Maintain personnel to provide needs assessment service.
 - Ongoing - Project Director - .5% FTE
- 2. Provide staff direction/supervision, develop job descriptions, and work programs, develop a training program and evaluate staff.
 - Ongoing - Project Director - .5% FTE
- 3. Accept referrals from community agencies and citizens through I&R Specialist.
 - Ongoing - 2 Counselors - 2.5% FTE = 5% FTE
 - 1 Counselor - 1.25% FTE
- 4. Perform needs assessments (complete client information form).
 - Ongoing - 2 Counselors - 5% FTE = 10% FTE
 - 1 Counselor - 2.50% FTE
- 5. Monitor needs assessment activities to insure contract compliance and quality of service.
 - Monthly - Project Director - 1% FTE

PERFORMANCE INDICATORS

PROGRAM ELEMENTS/STAFFING PATTERNS

OBJECTIVE

5. Maintain access to needed services among elderly residents by providing 93 different individuals who meet the established needs criteria with 758 hours of Level I case management and with an average caseload of 71 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.

1. Maintain personnel to provide ongoing case planning and case management services.
 Ongoing - Project Director - .58 FTE

2. Provide personnel direction/supervision, and work programs for all assigned personnel.
 Ongoing - Project Director - 1% FTE

3. Accept referrals from agencies, individuals and other agency staff for older persons in need of case planning and case management.
 Ongoing - 2 Counselors - .5% FTE = 1%
 1 Counselor - .25% FTE

4. Perform a needs assessment and develop a service plan according to AAA standards for level 1 limited access clients.
 Ongoing - 2 Counselors - 5% FTE = 10% FTE
 1 Counselor - 2.5% FTE

5. Conduct weekly service planning sessions to insure support quality with review of case managers progress on service plans for clients assigned.
 Weekly - Project Director - 3% FTE
 2 Counselors - 3% FTE = 6% FTE
 1 Counselor - 1.5% FTE

6. Implement service plans by making appropriate referrals to service providing agencies, including advocacy, monitoring and follow-up and to insure quality of service delivery.
 Ongoing - 2 Counselors - 7.5% FTE = 15% FTE
 1 Counselor - 3.75% FTE

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PERFORMANCE INDICATORS

PROGRAM ELEMENTS/STAFFING PATTERNS

OBJECTIVE

5. Level I Case Management

7. Perform a needs re-assessment on each client every 6 months.

Ongoing - 2 Counselors 5% FTE = 10% FTE
1 Counselor 2.5% FTE

8. Monitor activities to insure contract compliance and quality of service.

Monthly - Project Director - 1% FTE

9. Request waivers for all applications not conforming to AAA guidelines for case management.

Ongoing - Project Director - .5% FTE

OBJECTIVE

6. Maintain access to needed services among elderly residents by providing 33 different individuals who meet the established needs criteria with 560 hours of Level II case management and with an average caseload of 25 during the period July 1, 1981 through June 30, 1982.

PERFORMANCE INDICATORS

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.

PROGRAM ELEMENTS/STAFFING PATTERNS

- 1. Maintain personnel to provide case planning and case management services.
Ongoing - Project Director - .5% FTE
- 2. Provide personnel direction/supervision, and work programs for all assigned personnel.
Ongoing - Project Director - 2% - FTE
- 3. Accept referrals from agencies, individuals and other agency staff for older persons in need of case planning case management.
Ongoing - 2 Counselors - 1% FTE = 2% FTE
1 Counselor .5% FTE
- 4. Perform a needs assessment and develop a case plan according to AAA standards for level II limited access clients.
Ongoing - 2 Counselors 5% FTE - 10% FTE
1 Counselor 2.5% FTE
- 5. Conduct weekly case planning and case management staffing sessions to insure service quality with review of case managers progress on case plans for assigned level II clients.
Weekly - Project Director 5% FTE
2 Counselors - 3% FTE = 6%
1 Counselor 1.5% FTE
- 6. Implement case plans by making appropriate referrals to service providing agencies, including advocacy, monitoring follow-up and interagency consultations to insure delivery.
Ongoing - Project Director - 10% FTE
2 Counselors - 15% FTE = 30% FTE
1 Counselor - 7.5% FTE

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PERFORMANCE INDICATORS

PROGRAM ELEMENTS/STAFFING PATTERNS

OBJECTIVE

6. Level II Case Management

7. Perform a needs re-assessment on each client every 3 months.

Ongoing - 2 Counselors - 9% FTE = 18% FTE
1 Counselor 4.5% FTE

8. Monitor case planning and case management activities to insure contract compliance and quality of service.

Monthly - Project Director 1% FTE

9. Waivers completed and submitted to HRB.

Ongoing - Project Director .5% FTE

OBJECTIVE

7. To increase the access to and utilization of appropriate services by homebound, isolated and/or at risk elderly through the provision of 31 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.

PROGRAM ELEMENTS/STAFFING PATTERNS

- 1. Maintain personnel to provide an outreach service.
 - Ongoing - Project Director - .5% FTE
- 2. Provide staff direction/supervision, develop job descriptions and work programs, develop a training program and evaluate staff.
 - Ongoing - Project Director - .5% FTE
- 3. Accept referrals from agencies, individuals and other agency staff for older adults who are presumed to be in need of service(s).
 - Ongoing 2 Counselors - .5% FTE = 1% FTE
 - 1 Counselor - .25% FTE
- 4. Develop ongoing communications with community agencies and individuals to inform them of outreach services where- by referrals may be generated.
 - Ongoing - Project Director - 1.5% FTE
- 5. Develop on outreach plan using the resources of the Senior Center Fuel Assistance Program and Agency Programs.
 - July 2 - Project Director - .5% FTE
- 6. Implement outreach plan by home visits.
 - Ongoing - Project Director - 2% - FTE
 - 2 Counselors - 8% FTE = 16% FTE
 - 1 Counselor - 4% FTE
- 7. Maintain records and monitor outreach service to insure contract compliance.
 - Ongoing - Project Director - 2%

PERFORMANCE
INDICATORS

PROGRAM ELEMENTS/STAFFING PATTERNS

OBJECTIVE

8. Escort

To increase access to needed services through the provision of 51 escort service units to 26 different individuals to those elderly persons who meet the established needs criteria and require companionship to insure a completed journey to services.

Number of escorts provided.

Number of individuals served.

1. Maintain personnel to provide escort service.

Ongoing - N.H. Inc. Program Director - 3.5% FTE (M)
Ongoing - Project Director - .5% FTE

2. Provide staff direction/supervision, develop job descriptions and work programs, develop a training program and evaluate staff.

Ongoing - Project Director - 1% FTE

3. Accept referrals from agencies, individuals, case counselors, and other agency staff for older adults in need of escort services.

Ongoing - 2 Counselors - .5% FTE = 1% FTE
1 Counselor - .25% FTE

4. Perform escort service, fill out required forms.

Ongoing - 2 Counselors - 9.5% = 19% FTE
1 Counselor 4.75% FTE

5. Provide reports, maintain records and monitor escort service to insure contract compliance and quality of service.

Ongoing - Project Director - 1% FTE

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PERFORMANCE INDICATORS

PROGRAM ELEMENTS/STAFFING PATTERNS

OBJECTIVE

9. Immediate Transportation
 To provide 101 units of portal-to-portal immediate transportation for 33 different individuals who are unable to access a pre-scheduled service due to unexpected necessity of service or unavailability of such service, and who have no other transportation.

Number of one way rides.
 Number of individuals served.

1. Maintain personnel to provide transportation service.
 Ongoing - N.H. Inc. Program Director - 3.5% FTE (M)
 Ongoing - Project Director - .5% FTE
2. Provide staff direction/supervision, develop job descriptions and work programs develop a training program and evaluate staff.
 Ongoing - Project Director - 1% FTE
3. Accept referrals from agencies, individuals, case counselors, ongoing and other agency staff for older adults in need of transportation.
 Ongoing - 2 Counselors - .5% FTE = 1% FTE
 1 Counselor - .25% FTE
4. Provide immediate and flexible transportation and complete required forms.
 Ongoing - 2 Counselors - 9.5% FTE = 19% FTE
 1 Counselor - 4.75% FTE
 1 Project Director - 1.5% FTE
5. Provide reports, maintain records and monitor immediate transportation service to insure contract compliance and quality of service.
 Ongoing - Project Director - 1% FTE

PERFORMANCE INDICATORS

PROGRAM ELEMENTS/STAFFING PATTERNS

<p>10. Friendly Visitation</p> <p>To reduce isolation of 30 elderly residents from social contact through the provision of 100 hours of friendly visiting.</p>	<p>Number of hours of friendly visiting.</p> <p>Number of individuals served.</p>	<p>1. Maintain personnel to provide a friendly visitation service.</p> <p>Ongoing - N.H. Inc. Program Director - 5.5% FTE (M) Ongoing - Project Director - .5% FTE</p> <p>2. Provide staff direction/supervision, develop job descriptions and work programs, develop a training program and evaluate staff.</p> <p>Ongoing - Project Director - .5% FTE</p> <p>3. Accept referrals from agencies, individuals, case counselors and other agency staff for older adults in need of friendly visiting.</p> <p>Ongoing - 2 Counselors - .5% FTE = 1% FTE 1 Counselor - .25% FTE</p> <p>4. Provide friendly visitation service and complete required forms and documentation.</p> <p>Ongoing - 2 Counselors - 9.5% FTE = 19% FTE 1 Counselor 4.75% FTE</p> <p>5. Provide reports, maintain records and monitor friendly visiting service to insure contract compliance and quality of service.</p> <p>Ongoing - Project Director - .5% FTE</p>
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PERFORMANCE INDICATORS	PROGRAM ELEMENTS/STAFFING PATTERNS
<p>11. Provide supervision of 50 hours of chore/home maintenance to 15 different individuals.</p>	<p>1. Maintain personnel to provide supervision for chore/home maintenance service. Ongoing - N.H. Inc. - Program Director - 7% FTE (M) Ongoing - Project Director - .5% FTE</p> <p>2. Provide staff direction/supervision, develop job descriptions and work programs, develop a training program and evaluate staff. Ongoing - Project Director - .5% FTE</p> <p>3. Accept referrals from agencies, individuals, case counselors and other agency staff for older adults in need of chore/home maintenance. Ongoing - I&R Specialist - 1% FTE</p> <p>4. Arrange for chore/home maintenance services to be provided, complete required forms. Ongoing - I&R Specialist - 4% FTE</p> <p>5. Provide reports, maintain records and monitor chore/home maintenance to insure contract compliance and quality of service. Ongoing - I&R Specialist - 2% FTE</p>

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

The Senior Adult Program at Neighborhood House, Inc. operates on a team approach. The Project Director is responsible for working with the Advisory Committee program development and the implementation, community coordination, and the volunteer program. The Project Director will also be responsible for supervising the counseling staff which includes 2½ FTE counselors, the information and referral specialist, volunteers and the agency's executive director serves as the program's representative in city-wide coordination efforts. The staff is involved in monthly in-house training sessions as well as training programs sponsored by the representatives from the staff, the Advisory Board, and occasionally from the HRB Aging Program. The executive director of the agency has final authority in all hiring. The program operates from 9:00 a.m. to 5:00 p.m. on weekdays. The agency is closed on New Year's Eve, New Year's Day, Washington's Birthday, Memorial Day, Independence Day, Labor Day, Veteran's Day, Thanksgiving Day, Christmas Eve and Christmas Day.

At the present time, there is no Senior Center i.e. a specific location for education and recreation. However, staff is capable of responding to emergencies of an older person when a call for help is received at the office of Neighborhood House, Inc. from the older person himself/herself or an individual in the natural network. A staff member and vehicle are always scheduled to be at the agency so as to provide immediate transportation and support when the need arises. The normal chain of communication is from agency receptionist to information and referral specialist to assigned counselor.

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.)

The statement of purpose of Neighborhood House, Inc. is in keeping with the philosophy and strategy of the Area Agency on Aging. It reads: "Neighborhood House, Inc. is a community service agency for the greater Southwest area. The purpose of the agency is to help people help themselves by providing social services and community action programs responsive to the needs of its users within the service area."

The Southwest Senior Services of Neighborhood House, Inc. receives administrative support from the executive director, program director and bookkeeper of the agency. Members of the Board of Directors are recruited and elected to provide skills in fund raising, advocacy and volunteer recruitment as well as insight into the needs of the greater Southwest Portland community.

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 Southwest Advisory Committee on Aging for the Senior Program function is to recommend policy and programs. Citizen involvement also has high priority in the preparation of the United Way budget. The process includes meetings with consumer groups, Program Committee, Finance Committee and finally with the Neighborhood House, Inc. Board of Directors for approval. The members of the Board are involved in program planning, evaluation and fiscal management.

The utilization of volunteers in the Senior Adult Program is under the direction of the Project Director. Volunteers are recruited by program staff; some of the elderly clients volunteer in some way. All volunteers are interviewed for their interest and skills. They are then trained and placed in the appropriate area, i.e. friendly visiting, escort, telephone reassurance, transportation and are given continual support and recognition by the staff.

Neighborhood House, Inc. also has an aggressive recruitment and placement program for under graduate students needing quality placements to enhance their professional and academic growth.

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.)

The Senior Adult Program of Neighborhood House coordinates with other area wide agencies to pool resources, fill gaps and avoid service duplications. In order to strengthen the delivery system of Neighborhood based services Neighborhood House Senior Adult Program coordinates its activities and services to pool resources within the community. Some of these agencies are: The S.W. Youth Service Center to provide casual labor, yard work, S.W. churches to provide social-recreational events, Visiting Nurses and Multnomah County Public Health Nurses to insure ongoing physical/mental evaluation for S.W. elderly. The program is responsible for knowing local agencies and groups who play important roles in the lives of their respective participants and is responsible for cooperating and coordinating with those groups.

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Neighborhood House

81-82

EXHIBIT B

BUDGETS AND ATTACHMENTS

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

a. City Support Requested

III-B	\$27,583
City/County General Fund	27,582
Subtotal	55,165
Required Match (Cash and/or In-Kind)	3,100
Program Income	- 0 -
Subtotal	55,265

Other Resources:

	Cash	In-Kind	
Source of revenue: <u>United Way</u>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	(one only)
Funding source: <u>City/County</u>			
Service category: <u>Chore/Home Maint.</u>			
Administration: <u>- 0 -</u>			
Service: <u>8,740</u>			
Total			\$ 8,740
Source of revenue: <u>Neighborhood House</u>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Funding source: <u>City/County Gen. Fund</u>			
Service category: <u>Friendly Visiting</u>			
Administration: <u>- 0 -</u>			
Service: <u>2,400</u>			
Total			\$ 2,400

	<u>Cash</u>	<u>In-Kind</u>	
Source of revenue: <u>Neighborhood House</u>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Funding source: <u>III-B</u>			
Service category: <u>Escort</u>			
Administration: <u>- -</u>			
Service: <u>624</u>			
Total:			\$ <u>624.00</u>
Source of revenue: <u>United Way</u>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Funding source: <u>City/County General Fund</u>			
Service category: <u>Case Management II</u>			
Administration: _____			
Service: <u>1,858</u>			
Total:			\$ <u>1,858.00</u>
Source of revenue: _____	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Funding source: _____			
Service category: _____			
Administration: _____			
Service: _____			
Total:			\$ _____
Source of revenue: _____	<input type="checkbox"/>	<input type="checkbox"/>	
Funding source: _____			
Service category: _____			
Administration: _____			
Service: _____			
Total:			\$ _____
Subtotal:			\$ <u>13,622</u>
TOTAL			\$ <u><u>71,887</u></u>

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

Neighborhood House, Inc. has received United Way funds since 1955. This fund is used as cash match.

Neighborhood House, Inc. uses support from various foundations, fund raisers, volunteer's, grants and contributions to support the Southwest Senior Services with other resources.

Statement of Certification

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

 _____ Date 5/4/81
Authorized Signature

Southwest Aging District Services
 Neighborhood House, Inc.
 7/1/81 ÷ 6/30/82

APPROPRIATION UNIT 151820
 LINE ITEM WORKSHEET

Code	Object Title	Title III-B I & R Services	Title III-B I & R Administration	Title III-B Assessment Services	Title III-B Assessment Administration	Title III-B C.M.- I Services
110	Full-Time Employees	9,977				
120	Part-Time Employees		918	1,934	262	5,413
130	Federal Program Enrollees					
140	Overtime					
150	Premium Pay					
170	Benefits	1,097	101	213	29	595
190	Less-Labor Turnover					
100	Total Personal Services	11,074	1,019	2,147	291	6,008
210	Professional Services					
220	Utilities					
230	Equipment Rental					
240	Repair & Maintenance					
260	Miscellaneous Services					
310	Office Supplies					
320	Operating Supplies			100		
330	Repair & Maint. Supplies					
340	Minor Equipment & Tools					
350	Clothing & Uniforms					
380	Other Commodities-External					
410	Education					
420	Local Travel			125		125
430	Out-of-Town Travel			150		1,396
440	Space Rental					
450	Interest					
460	Refunds					
470	Retirement System Payments					
490	Miscellaneous (postage)	60				
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	130		100		340
590	Other Services-Internal					
200- 500	Total Materials & Services	190		475		1,861
610	Land					
620	Buildings					
630	Improvements					
640	Furniture & Equipment					
600	Total Capital Outlay					
700	Other					
	TOTAL	11,264	1,019	2,622	291	7,869

Code	Object Title	Title III-B C.M. - I Administration	Title III-B Escort Service	Title III-B Escort Administration	C/C Gen. Fund C.M.- II Service	C/C Gen. Fund C.M.- II Administration
110	Full-Time Employees	787	2,577	328	9,816	1,180
120	Part-Time Employees					
130	Federal Program Enrollees					
140	Overtime					
150	Premium Pay					
170	Benefits	87	283	36	1,080	130
190	Less-Labor Turnover					
100	Total Personal Services	874	2,860	364	10,896	1,310
210	Professional Services					
220	Utilities					
230	Equipment Rental					
240	Repair & Maintenance					
260	Miscellaneous Services					
310	Office Supplies				400	
320	Operating Supplies					
330	Repair & Maint. Supplies					
340	Minor Equipment & Tools					
350	Clothing & Uniforms					
380	Other Commodities-External					
410	Education				150	
420	Local Travel		300		518	32
430	Out-of-Town Travel					
440	Space Rental					
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					
570	Telephone Services		120		120	
580	Intra-Fund Services					
590	Other Services-Internal					
200- 500	Total Materials & Services		420		1,188	32
610	Land					
620	Buildings					
630	Improvements					
640	Furniture & Equipment					
600	Total Capital Outlay					
700	Other					
	TOTAL	874	3,280	364	12,084	1,342

Southwest Aging District Services
 Neighborhood House, Inc.
 7-1-81 - 6-30-82

APPROPRIATION UNIT
 LINE ITEM WORKSHEET 151820

Code	Object Title	C/C Gen. Fund Outreach Service	C/C Gen. Fund Outreach Administration	C/C Gen. Fund Transportation Service	C/C Gen. Fund Transportation Administration	C/C Gen. Fund Friendly Visit Service
110	Full-Time Employees	2,715	393	2,774	328	2,577
120	Part-Time Employees					
130	Federal Program Enrollees					
140	Overtime					
150	Premium Pay					
170	Benefits	299	43	305	36	283
190	Less-Labor Turnover					
100	Total Personal Services	3,014	436	3,079	364	2,860
210	Professional Services					
220	Utilities					
230	Equipment Rental					
240	Repair & Maintenance					
260	Miscellaneous Services					
310	Office Supplies	100				
320	Operating Supplies					
330	Repair & Maint. Supplies					
340	Minor Equipment & Tools					
350	Clothing & Uniforms					
380	Other Commodities-External					
410	Education					
420	Local Travel	100		552	48	576
430	Out-of-Town Travel					
440	Space Rental					
450	Interest					
460	Refunds					
470	Retirement System Payments					
490	Miscellaneous (postage)	240				
510	Fleet Services					
520	Printing Services	700				
530	Distribution Services					
540	Electronic Services					
550	Data Processing Services					
560	Insurance					
570	Telephone Services	80		80		80
580	Intra-Fund Services					
590	Other Services-Internal					
200-500	Total Materials & Services	1,220		632	48	656
610	Land					
620	Buildings					
630	Improvements					
640	Furniture & Equipment					
600	Total Capital Outlay					
700	Other					
	TOTAL	4,234	436	3,711	412	3,516

Code	Object Title	Cash Match Escort Administration	Cash Match Friendly Visit Administration	Cash Match Chore Maint. Administration	Total Cash Match	Other Resources
110	Full-Time Employees	501	788	1,003	2,793	
120	Part-Time Employees					10,598
130	Federal Program Enrollees					
140	Overtime					
150	Premium Pay					
170	Benefits	55	87	110	307	stipend
190	Less-Labor Turnover					
100	Total Personal Services	556	875	1,113	3,100	10,598
210	Professional Services: volunteers					3,024
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					
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					
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	- 0 -	- 0 -	- 0 -	- 0 -	3,024
610	Land					
620	Buildings					
630	Improvements					
640	Furniture & Equipment					
600	Total Capital Outlay					
700	Other					
	TOTAL	556	875	1,113	3,100	13,622

Southwest Aging District Services
 Neighborhood House, Inc.
 7-1-81 - 6-30-82

APPROPRIATION UNIT **151820**
 LINE ITEM WORKSHEET

Code	Object Title	Total Contract			
110	Full-Time Employees	45,851			
120	Part-Time Employees	10,598			
130	Federal Program Enrollees				
140	Overtime				
150	Premium Pay				
170	Benefits	5,043			
190	Less-Labor Turnover				
100	Total Personal Services	61,492			
210	Professional Services	3,024			
220	Utilities				
230	Equipment Rental				
240	Repair & Maintenance				
260	Miscellaneous Services				
310	Office Supplies	700			
320	Operating Supplies				
330	Repair & Maint. Supplies				
340	Minor Equipment & Tools				
350	Clothing & Uniforms				
380	Other Commodities-External				
410	Education	450			
420	Local Travel	4,001			
430	Out-of-Town Travel				
440	Space Rental				
450	Interest				
460	Refunds				
470	Retirement System Payments				
490	Miscellaneous (postage)	300			
510	Fleet Services				
520	Printing Services	700			
530	Distribution Services				
540	Electronic Services				
550	Data Processing Services				
560	Insurance				
570	Telephone Services	1,220			
580	Intra-Fund Services				
590	Other Services-Internal				
200-500	Total Materials & Services	\$10,395			
610	Land				
620	Buildings				
630	Improvements				
640	Furniture & Equipment				
600	Total Capital Outlay				
700	Other				
	TOTAL	\$71,887			5-1-81

CONTRACT BUDGET JUSTIFICATION

PERSONNEL

151820

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE Southwest Aging District Services

AGENCY Neighborhood House, Inc.

Information and Referral - Service
Service Category (if applicable)

FUNDING SOURCE Title 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	Info. & Ref. Spec.	894	93	12	9,977
SUB-TOTAL, PERSONNEL					9,977
11% * % FRINGE BENEFITS					1,097
TOTAL, PERSONNEL					11,074

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

CONTRACT BUDGET JUSTIFICATION

PERSONNEL

151820

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE Southwest Aging District Services

AGENCY Neighborhood House, Inc.

Information and Referral - Administration
Service Category (if applicable)

FUNDING SOURCE Title 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	Project Director	1,093	7	12	918
SUB-TOTAL, PERSONNEL					918
11%* % FRINGE BENEFITS					101
TOTAL, PERSONNEL					1,019

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

CONTRACT BUDGET JUSTIFICATION

PERSONNEL

151820

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE Southwest Aging District Services

AGENCY Neighborhood House, Inc.

Assessment - Service
Service Category (if applicable)

FUNDING SOURCE Title 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	Field Counselor	942	7.5	12	848
1	Field Counselor	713	7.5	12	642
1	Field Counselor	942	3.75	3	106
1	Field Counselor	1000	3.75	9	338
SUB-TOTAL, PERSONNEL					1,934
11% * % FRINGE BENEFITS					213
TOTAL, PERSONNEL					2,147

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

CONTRACT BUDGET JUSTIFICATION

PERSONNEL

151820

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE Southwest Aging District Services

AGENCY Neighborhood House, Inc.

Assessment - Administration
Service Category (if applicable)

FUNDING SOURCE Title 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	Project Director	1,093	2	12	262
SUB-TOTAL, PERSONNEL					262
11% * % FRINGE BENEFITS					29
TOTAL, PERSONNEL					291

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

CONTRACT BUDGET JUSTIFICATION

151820

PERSONNEL

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE Southwest Aging District Services

AGENCY Neighborhood House, Inc.

Case Management I - Service
Service Category (if applicable)

FUNDING SOURCE Title 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	Field Counselor	942	21	12	2,374
1	Field Counselor	713	21	12	1,797
1	Field Counselor	942	10.5	3	297
1	Field Counselor	1,000	10.5	9	945
SUB-TOTAL, PERSONNEL					5,413
11% * % FRINGE BENEFITS					595
TOTAL, PERSONNEL					6,008

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

CONTRACT BUDGET JUSTIFICATION

151820

PERSONNEL

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE Southwest Aging District Services

AGENCY Neighborhood House, Inc.

Case Management I - Administration
Service Category (if applicable)

FUNDING SOURCE Title 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	Project Director	1,093	6	12	787
SUB-TOTAL, PERSONNEL					787
11% * % FRINGE BENEFITS					87
TOTAL, PERSONNEL					874

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

CONTRACT BUDGET JUSTIFICATION

151820

PERSONNEL

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE Southwest Aging District Services

AGENCY Neighborhood House, Inc.

Escort - Services
Service Category (if applicable)

FUNDING SOURCE Title 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	Field Counselor	942	10	12	1,130
1	Field Counselor	713	10	12	856
1	Field Counselor	942	5	3	141
1	Field Counselor	1,000	5	9	450
SUB-TOTAL, PERSONNEL					2,577
11% * % FRINGE BENEFITS					283
TOTAL, PERSONNEL					2,860

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

CONTRACT BUDGET JUSTIFICATION

151820

PERSONNEL

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE Southwest Aging District Services

AGENCY Neighborhood House, Inc.

Escort - Administration
Service Category (if applicable)

FUNDING SOURCE Title 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	Project Director	1,093	2.5	12	328
SUB-TOTAL, PERSONNEL					328
11% * % FRINGE BENEFITS					36
TOTAL, PERSONNEL					364

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

CONTRACT BUDGET JUSTIFICATION

151820

PERSONNEL

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE Southwest Aging District Services

AGENCY Neighborhood House, Inc.

Case Management II - Service

FUNDING SOURCE City/County General Fund

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	Field Counselor	942	33	12	3,730
1	Field Counselor	713	33	12	2,823
1	Field Counselor	942	16.5	3	466
1	Field Counselor	1,000	16.5	9	1,485
1	Project Director	1,093	10	12	1,312
SUB-TOTAL, PERSONNEL					9,816
11% * % FRINGE BENEFITS					1,080
TOTAL, PERSONNEL					10,896

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

CONTRACT BUDGET JUSTIFICATION

151820

PERSONNEL

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE Southwest Aging District Services

AGENCY Neighborhood House, Inc.

Case Management II - Administration
Service Category (if applicable)

FUNDING SOURCE City/County 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	Project Director	1,093	9	12	1180
SUB-TOTAL, PERSONNEL					1180
11% * % FRINGE BENEFITS					130
TOTAL, PERSONNEL					1310

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

CONTRACT BUDGET JUSTIFICATION

151820

PERSONNEL

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE Southwest Aging District Services

AGENCY Neighborhood House, Inc.

Outreach - Services
Service Category (if applicable)

FUNDING SOURCE City/County 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	Field Counselor	942	8.5	12	961
1	Field Counselor	713	8.5	12	727
1	Field Counselor	942	4.25	3	120
1	Field Counselor	1,000	4.25	9	382
1	Project Director	1,093	4	12	525
SUB-TOTAL, PERSONNEL					2,715
		11%	* % FRINGE BENEFITS		299
TOTAL, PERSONNEL					3,014

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

CONTRACT BUDGET JUSTIFICATION

151820

PERSONNEL

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE Southwest Aging District Services

AGENCY Neighborhood House, Inc.

Outreach - Administration
Service Category (if applicable)

FUNDING SOURCE City/County 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	Project Director	1,093	3	12	393
SUB-TOTAL, PERSONNEL					393
11% * % FRINGE BENEFITS					43
TOTAL, PERSONNEL					436

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

CONTRACT BUDGET JUSTIFICATION

151820

PERSONNEL

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE Southwest Aging District Services

AGENCY Neighborhood house, Inc.

Immediate Transportation Services

Service Category (if applicable)

FUNDING SOURCE City/County 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	Field Counselor	942	10	12	1,130
1	Field Counselor	713	10	12	856
1	Field Counselor	942	5	3	141
1	Field Counselor	1,000	5	9	450
1	Project Director	1,093	1.5	12	197
SUB-TOTAL, PERSONNEL					2,774
11% * % FRINGE BENEFITS					305
TOTAL, PERSONNEL					3,079

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

CONTRACT BUDGET JUSTIFICATION

151820

PERSONNEL

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE Southwest Aging District Services

AGENCY Neighborhood House, Inc.

Immediate Transportation-Administration
Service Category (if applicable)

FUNDING SOURCE City/County 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	Project Director	1,093	2.5	12	328
SUB-TOTAL, PERSONNEL					328
11% * % FRINGE BENEFITS					36
TOTAL, PERSONNEL					364

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

CONTRACT BUDGET JUSTIFICATION

151820

PERSONNEL

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE Southwest Aging District Services

AGENCY Neighborhood House, Inc.

Friendly Visitation - Service

Service Category (if applicable)

FUNDING SOURCE City/County 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	Field Counselor	942	10	12	1,130
1	Field Counselor	713	10	12	856
1	Field Counselor	942	5	3	141
1	Field Counselor	1000	5	9	450
SUB-TOTAL, PERSONNEL					2,577
		11%	* % FRINGE BENEFITS		283
TOTAL, PERSONNEL					2,860

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

CONTRACT BUDGET JUSTIFICATION

151820

PERSONNEL

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE Southwest Aging District Services

AGENCY Neighborhood House, Inc.

Friendly Visitation - Administration
Service Category (if applicable)

FUNDING SOURCE City/County 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	Project Director	1,093	1.5	12	197
SUB-TOTAL, PERSONNEL					197
		11%	* % FRINGE BENEFITS		22
TOTAL, PERSONNEL					219

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

CONTRACT BUDGET JUSTIFICATION

151820

PERSONNEL

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE Southwest Acina District Services

AGENCY Neighborhood House, Inc.

Chore Home Maintenance - Service
Service Category (if applicable)

FUNDING SOURCE City/County 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	Info. & Ref. Spec.	894	7	12	751
SUB-TOTAL, PERSONNEL					751
11% * % FRINGE BENEFITS					83
TOTAL, PERSONNEL					834

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

CONTRACT BUDGET JUSTIFICATION

151820

PERSONNEL

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE Southwest Aging District Services

AGENCY Neighborhood House, Inc.

Chore Home Maintenance - Administration
Service Category (if applicable)

FUNDING SOURCE City/County 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	Project Director	1,093	1	12	131
SUB-TOTAL, PERSONNEL					131
11% * % FRINGE BENEFITS					14
TOTAL, PERSONNEL					145

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

CONTRACT BUDGET JUSTIFICATION

151820

PERSONNEL

CONTRACT NO. _____

DATE 5-1-81

PROJECT TITLE Southwest Aging District Services

AGENCY Neighborhood House, Inc.

Total City Support _____

Service Category (if applicable) _____

FUNDING SOURCE Total City Support

(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	Project Director	1,093	50%	12	\$ 6,556
1	Information & Referral Specialist	894	100%	12	10,728
1	Field Counselor	942	100%	12	11,301
1	Field Counselor	713	100% *	12	8,560
1	Field Counselor	942	50%	3	1,413
1	Field Counselor	1,000	50%	9	4,500
SUB-TOTAL, PERSONNEL					\$43,058
	11%	* % FRINGE BENEFITS			4,736
TOTAL, PERSONNEL					47,794

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

* This person works 30 hours/week.

CONTRACT BUDGET JUSTIFICATION

151820

PERSONNEL

CONTRACT NO. _____

DATE 5-1-81

PROJECT TITLE Southwest Aging District Services

AGENCY Neighborhood Hosue, Inc.

Escort - Administration
Service Category (if applicable)

FUNDING SOURCE Cash 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)
1	N.H. Program Director	1,194	3.5	12	501
SUB-TOTAL, PERSONNEL					501
11% * % FRINGE BENEFITS					55
TOTAL, PERSONNEL					556

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

CONTRACT BUDGET JUSTIFICATION

151820

PERSONNEL

CONTRACT NO. _____

DATE 5-1-81

PROJECT TITLE Southwest Aging District Services

AGENCY Neighborhood House, Inc.

Transportation - Administration
Service Category (if applicable)

FUNDING SOURCE Cash 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)
1	N. H. Program Director	1,194	3.5	12	501
SUB-TOTAL, PERSONNEL					501
11 ² / ₃ * % FRINGE BENEFITS					55
TOTAL, PERSONNEL					556

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

CONTRACT BUDGET JUSTIFICATION

151820

PERSONNEL

CONTRACT NO. _____

DATE 5-1-81

PROJECT TITLE Southwest Aging District Services

AGENCY Neighborhood House, Inc.

Friendly Visitation - Administration
Service Category (if applicable)

FUNDING SOURCE Cash 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)
1	N.H. Program Director	1,194	5.5	12	788
SUB-TOTAL , PERSONNEL					788
11% * % FRINGE BENEFITS					87
TOTAL, PERSONNEL					875

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

CONTRACT BUDGET JUSTIFICATION

151820

PERSONNEL

CONTRACT NO. _____

DATE 5-1-81

PROJECT TITLE Southwest Aging District Services

AGENCY Neighborhood House, Inc.

Chore/Home Maint. - Admin.

FUNDING SOURCE Cash 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)
1	N.H. Program Director	1,194	7	12	1003
SUB-TOTAL, PERSONNEL					1,003
11% * % FRINGE BENEFITS					110
TOTAL, PERSONNEL					1,113

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

CONTRACT BUDGET JUSTIFICATION

PERSONNEL

CONTRACT NO. _____

DATE 5-1-81

PROJECT TITLE Southwest Aging District Services

AGENCY Neighborhood House, Inc.

Total Cash Match

Service Category (if applicable)

FUNDING SOURCE Cash 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)
1	N.H. Program Director	1,194	19.5	12	2,793
SUB-TOTAL, PERSONNEL					2,793
		11%	* % FRINGE BENEFITS		307
TOTAL, PERSONNEL					3,100

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

CONTRACT BUDGET JUSTIFICATION

PERSONNEL

CONTRACT NO. _____

DATE 5-1-81PROJECT TITLE Southwest Aging District ServicesAGENCY Neighborhood House, Inc.Total Contract
Service Category (if applicable)FUNDING SOURCE Total Contract

(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	Project Director	1,093	50	12	6,556
1	Information & Referral Specialist	894	100	12	10,728
1	Field Counselor	942	100	12	11,301
1	Field Counselor	713	100	12	8,560
1	Field Counselor	942	50	3	1,413
1	Field Counselor	1,000	50	9	4,500
1	N.H. Program Director	1,194	19.5	12	2,793
	Other Resources - Part Time				10,598
SUB-TOTAL, PERSONNEL					56,449
9% * % FRINGE BENEFITS					5,043
TOTAL, PERSONNEL					61,492

* 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 Southwest Aging District Services

AGENCY Neighborhood House, Inc.

Information and Referral Service
Service Category (if applicable)

FUNDING SOURCE Title III-B

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
490	Miscellaneous (Postage)	\$ 60	\$ 60
570	Telephone Services	\$ 130	\$ 130

CONTRACT BUDGET JUSTIFICATION

151820

MATERIALS AND SERVICES

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE Southwest Aging District Services

AGENCY Neighborhood house, Inc.

Assessment Service
Service Category (if applicable)

FUNDING SOURCE Title III-B

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
310	Office Supplies	\$ 100	\$ 100
410	Education	\$ 125	\$ 125
420	Local Travel @ \$.21 per mile	\$ 150	\$ 150
570	Telephone Services	\$ 100	\$ 100

151820

CONTRACT BUDGET JUSTIFICATION

MATERIALS AND SERVICES

DATE May 1, 1981

CONTRACT NO. _____

PROJECT TITLE Southwest Aging District Services

AGENCY Neighborhood House, Inc.

Case Management I Service
Service Category (if applicable)

FUNDING SOURCE Title III-B

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
410	*Education	\$ 125	\$ 125
420	Local Travel @ \$.21 per mile	\$ 1396	\$ 1396
570	Telephone Services	\$ 340	\$ 340

CONTRACT BUDGET JUSTIFICATION

151820

MATERIALS AND SERVICES

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE Southwest Aging District Services

AGENCY Neighborhood House Inc.

Escort Services
Service Category (if applicable)

FUNDING SOURCE Title III-B

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
420	Local Travel @ \$.21 per mile	\$ 300	\$ 300
570	Telephone Services	\$ 120	\$ 120

CONTRACT BUDGET JUSTIFICATION

MATERIALS AND SERVICES

CONTRACT NO. _____

DATE May 1, 1981PROJECT TITLE Southwest Aging District ServicesAGENCY Neighborhood House, Inc.Case Management II Service
Service Category (if applicable)FUNDING SOURCE City/County General Fund

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
310	Office Supplies	\$ 400	\$ 400
410	Education	\$ 150	\$ 150
420	Local Travel @ \$.21 per mile	\$ 518	\$ 518
570	Telephone Services	\$ 120	\$ 120

CONTRACT BUDGET JUSTIFICATION

MATERIALS AND SERVICES

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE Southwest Aging District Services

AGENCY Neighborhood House, Inc.

Case Management II-Administration
Service Category (if applicable)

FUNDING SOURCE City/County General Fund

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
420	Local Travel @ .21 per mile	32	32

CONTRACT BUDGET JUSTIFICATION

151820

MATERIALS AND SERVICES

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE Southwest Aging District Services

AGENCY Neighborhood House, Inc.

Outreach Service

FUNDING SOURCE City/County General Fund

Service Category (if applicable)

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
310	Office Supplies	\$ 100	\$ 100
420	Local Travel @ \$.21 per mile	\$ 100	\$ 100
490	Miscellaneous (Postage)	\$ 240	\$ 240
520	Printing Services	\$ 700	\$ 700
570	Telephone Services	\$ 80	\$ 80

CONTRACT BUDGET JUSTIFICATION

151820

MATERIALS AND SERVICES

CONTRACT NO. _____

DATE May 1, 1980

PROJECT TITLE Southwest Aging District Services

AGENCY Neighborhood House Inc.

Immediate Transportation Service
Service Category (if applicable)

FUNDING SOURCE City/County General Fund

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
420	Local Travel @ \$.21 per mile	\$ 552	\$ 552
570	Telephone Services	\$ 80	\$ 80

151820

15182

CONTRACT BUDGET JUSTIFICATION

MATERIALS AND SERVICES

CONTRACT NO. _____

DATE May 1, 1981PROJECT TITLE Southwest Aging District ServicesAGENCY Neighborhood House, inc.Immediate Transportation-Administration
Service Category (if applicable)FUNDING SOURCE City/County General Fund

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
420	Local Travel @ \$.21 per mile	48	48

CONTRACT BUDGET JUSTIFICATION

151820

MATERIALS AND SERVICES

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE Southwest Aging District Services

AGENCY Neighborhood House, Inc.

Friendly Visitation - Service
Service Category (if applicable)

FUNDING SOURCE City/County General Fund

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
420	Local Travel @ \$.21 per mile	\$ 576	\$ 576
570	Telephone Services	\$ 80	\$ 80

CONTRACT BUDGET JUSTIFICATION

151820

MATERIALS AND SERVICES

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE Southwest Aging District Services

AGENCY Neighborhood House, Inc.

Friendly Visiting-Administration
Service Category (if applicable)

FUNDING SOURCE City/County General Fund

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
420	Local Travel @ \$.21 per mile	171	171

CONTRACT BUDGET JUSTIFICATION

MATERIALS AND SERVICES

151820

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE Southwest Aging District Services

AGENCY Neighborhood House, Inc.

Chore Home Maintenance Service
Service Category (if applicable)

FUNDING SOURCE City/County General Fund

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
310	Office Supplies	\$ 100	\$ 100
410	Education	\$ 50	\$ 50
420	Local Travel @ \$.21 per mile	\$ 158	\$ 158
570	Telephone Services	\$ 170	\$ 170

CONTRACT BUDGET JUSTIFICATION

151820

MATERIALS AND SERVICES

CONTRACT NO. _____

DATE May 1, 1981

PROJECT TITLE Southwest Aging District Services

AGENCY Neighborhood House, Inc.

Total City Support
Service Category (if applicable)

FUNDING SOURCE Total City Support

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
310	Office Supplies	\$ 700	\$ 700
410	Education	\$ 450	\$ 450
420	Local Travel @ 21¢ per mile	\$ 4001	\$ 4001
490	Miscellaneous (Postage)	\$ 300	\$ 300
520	Printing Services	\$ 700	\$ 700
570	Telephone Services	\$ 1220	\$ 1220

CONTRACT BUDGET JUSTIFICATION

151820

MATERIALS AND SERVICES

CONTRACT NO. _____

DATE 5-1-81

PROJECT TITLE Southwest Aging District Services

AGENCY Neighborhood House, Inc.

Total Contract
Service Category (if applicable)

FUNDING SOURCE Total contract

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
210	Professional Services (volunteers)	\$ 3,024	\$ 3,024
310	Office Supplies	\$ 700	\$ 700
410	Education	\$ 450	\$ 450
420	Local Travel @ \$.21 per mile	\$ 4,001	\$ 4,001
490	Miscellaneous (postage)	\$ 300	\$ 300
520	Printing Services	\$ 700	\$ 700
570	Telephone Services	\$ 1,220	\$ 1,220

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

Neighborhood House, 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 affects their opportunities or status because of handicap.
3. The Contractor shall not participate in a contractual or other relationship that has the effect of subjecting qualified handicapped applicants or employees to discrimination.

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

As a provider of community services, the Contractor shall take appropriate steps in accordance with the established procedures, to assure that no qualified handicapped person, because of the Contractor's facilities are inaccessible to or 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 4 day of May, 1981.

By Dennis D. Powell

Title President, Board of Directors

029 SW Hamilton Street

Contractor's mailing address

JOINT DECLARATION

151820

Neighborhood House, Inc., and the City of Portland, Oregon, have filed a declaration agreeing that the services rendered under the Purchase Orders issued to Neighborhood House, Inc., by the City of Portland are rendered as those of an independent contractor, and _____ is performing the contract without the assistance of others.

IF Neighborhood House, Inc. should at any time, further attempt to subcontract work, or utilize employees to assist him/her in the performance of any additional work, said parties agree that those individuals are to be considered employees of the independent contractor, and not employees of the City of Portland, Oregon. The independent contractor, _____

Neighborhood House, Inc., hereby warrants, represents and agrees to indemnify the City of Portland, Oregon, against any and all claims or losses filed by any third parties who may, with or without the knowledge of the City of Portland, Oregon, become engaged as employees of the subcontractor; independent contractor in this contract, and will hold the City of Portland, Oregon, harmless of all costs incurred, including the defense costs.

THE independent contractor, Neighborhood House, Inc., recognizes that any attempt to employ or utilize other employees to assist in the performance of the contract, is specifically forbidden by the City of Portland, Oregon, and said agreements are not recognized by the City of Portland, Oregon, as binding upon them.

THE independent contractor, Neighborhood House, Inc., recognizes that if he/she attempts to utilize employees to assist him/her in the performance of the subcontract, that he/she subjects himself/herself to the sanctions of Chapter 656 of the Oregon Revised Statutes, including, but not limited to, being declared a non-complying employer and being required to qualify, either as a direct responsibility employer, or contributing employer.

THE parties further agree, stipulate and recognize that any attempt to utilize employees to assist in the performance of this contract shall be deemed an immediate and material breach of said contract, and the contract shall immediately be at an end at the commencement of the business day, prior to the subemployees commencing employment.

CONTRACTEE

BY: Dennis D Powell

Dated: 4-29-81

CITY OF PORTLAND, OREGON

BY: _____

Dated: _____

(This Joint Declaration, Form 7530-0056, prepared by the Office of the Purchasing Agent and approved as to form by the City Attorney.)

ASSURANCE OF COMPLIANCE
WITH THE CITY OF PORTLAND
AFFIRMATIVE ACTION PLAN

Neighborhood House, 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 5/4/81

By Dennis D. Powell

029 S.W. Hamilton Street
(Contractor's mailing address)

Title President, Board of Directors

Portland, Oregon 97201

ATTACHMENT

DISTRICT ADVISORY COMMITTEE REVIEW

151820

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

 x The District Advisory Committee approves the proposal for District Center Services.

 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.

David Little
Signature of Chairperson

1 May 1981
Date

151820

The Board of Directors of the Southwest Aging Services District in Portland/Multnomah County has reviewed the proposal for District Center Services to be provided by Neighborhood House, Inc. in the Southwest 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.

Dennis D Powell
Signature of Board Chairperson

5/4/81
Date

151820

EXHIBIT C
Required Reporting Forms
and
Procedures

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

151820

I. <u>Information and Referral</u>	<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. <u>District Services</u>		
A. <u>Outreach</u>		
Number of individuals located	_____	_____
B. <u>Friendly Visiting</u>		
1. Number of friendly visits	_____	_____
2. Number of individuals	_____	_____
3. Number of new individuals	_____	_____
C. <u>Escort</u>		
1. Number of escorts	_____	_____
2. Number of individuals served	_____	_____
3. Number of new individuals	_____	_____
D. <u>Chore/Home Maintenance</u>		
1. Number of chore services completed	_____	_____
2. Number of individuals served	_____	_____
3. Number of new individuals	_____	_____
E. <u>Immediate Transportation</u>		
1. Number of one way rides	_____	_____
2. Number of individuals served	_____	_____
3. Number of new individuals	_____	_____

Volunteers:

Estimated number of 60+ volunteers _____

Estimated number of minority volunteers _____

 Authorized Signature

 Date

151820

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

Southwest Aging District Services
 Neighborhood House, Inc.
 7-1-81 - 6-30-82

APPROPRIATION UNIT **151820**
 LINE ITEM WORKSHEET

Code	Object Title	C/C Gen. Fund Friendly visit Administration	C/C Gen. Fund Chore/Home Maintenance Service	C/C Gen. Fund Chore/Home Maintenance Administration	Total City Support	Cash Match Transportation Administration
110	Full-Time Employees	197	751	131	\$43,058	501
120	Part-Time Employees					
130	Federal Program Enrollees					
140	Overtime					
150	Premium Pay					
170	Benefits	22	83	14	4,736	55
190	Less-Labor Turnover					
100	Total Personal Services	219	834	145	\$47,794	556
210	Professional Services					
220	Utilities					
230	Equipment Rental					
240	Repair & Maintenance					
260	Miscellaneous Services					
310	Office Supplies		100		700	
320	Operating Supplies					
330	Repair & Maint. Supplies					
340	Minor Equipment & Tools					
350	Clothing & Uniforms					
380	Other Commodities-External					
410	Education		50		450	
420	Local Travel	171	158		4,001	
430	Out-of-Town Travel					
440	Space Rental					
450	Interest					
460	Refunds					
470	Retirement System Payments					
490	Miscellaneous (postage)				300	
510	Fleet Services					
520	Printing Services				700	
530	Distribution Services					
540	Electronic Services					
550	Data Processing Services					
560	Insurance					
570	Telephone Services		170		1,220	
580	Intra-Fund Services					
590	Other Services-Internal					
200- 500	Total Materials & Services	171	478		\$7,371	
610	Land					
620	Buildings					
630	Improvements					
640	Furniture & Equipment					
600	Total Capital Outlay					
700	Other					
	TOTAL	390	1,312	145	\$55,165	556 5-1-81