

151796

Cash In-Kind

Source of revenue: Department of Labor ☒ ☐Funding source: c/c General FundService category: Friendly Visiting

Administration: _____

Service: 4,500Total: \$ 4,500Source of revenue: Multnomah County ☒ ☐Funding source: c/c General FundService category: RecreationAdministration: 707

Service: _____

Total: \$ 707Source of revenue: Multnomah County ☒ ☐Funding source: c/c General FundService category: EducationAdministration: 2,746

Service: _____

Total: \$ 2,746Source of revenue: _____ ☐ ☐

Funding source: _____

Service category: _____

Administration: _____

Service: _____

Total: \$ _____

Subtotal: \$ 39,434TOTAL \$ 205,180

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

Cash match - cash raised by seniors in fund raising activities for the fiscal year July 1, 1981 - June 30, 1982

Other resources, Multnomah County - Funding provided by County for fiscal year ending June 30, 1982

Other resources, Department of Labor - status of funds available for older workers unknown at this time

Statement of Certification

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

Mary Lou Jacobs
Authorized Signature

Date May 28, 1981

Mary Lou Jacobs

Revised 3/24/81

Contract #18565
 East County Aging District Services
 MCCA
 7/1/81 - 6/30/82

APPROPRIATION UNIT
 LINE ITEM WORKSHEET 151796

Code	Object Title	Title III-B I & R Administration	Title III-B I & R Services	Title III-B Needs Assessment Administration	Title III-B Needs Assessment Services	Title III-B Case Management I Administration
110	Full-Time Employees	2,337	24,817	425	4,921	2,337
120	Part-Time Employees					
130	Federal Program Enrollees					
140	Overtime					
150	Premium Pay					
170	Benefits	441	5,460	143	1,132	504
190	Less-Labor Turnover					
100	Total Personal Services	2,778	30,277	568	6,053	2,841
210	Professional Services	428		86		436
220	Utilities					
230	Equipment Rental					
240	Repair & Maintenance					
260	Miscellaneous Services		100		100	
310	Office Supplies		125		85	
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		200			
530	Distribution Services					
540	Electronic Services					
550	Data Processing Services					
560	Insurance					
570	Telephone Services		1,360		300	
580	Intra-Fund Services					
590	Other Services-Internal					
200-500	Total Materials & Services	428	1,785	86	485	436
610	Land					
620	Buildings					
630	Improvements					
640	Furniture & Equipment					
600	Total Capital Outlay					
700	Other					
	TOTAL	3,206	32,062	654	6,538	3,277

APPROPRIATION UNIT
LINE ITEM WORKSHEET

151796

Code	Object Title	Title III-B Case Management Services	C/C General Fund/Case Mgmt. II Administration	C/C General Fund/Case Mgmt. II Services	C/C General Fund/Outreach Administration	C/C General Fund Outreach Services
110	Full-Time Employees	22,145	2,337	22,145	396	1,980
120	Part-Time Employees					
130	Federal Program Enrollees					
140	Overtime					
150	Premium Pay					
170	Benefits	5,093	504	5,093	70	455
190	Less-Labor Turnover					
100	Total Personal Services	27,238	2,841	27,238	466	2,435
210	Professional Services		160			318
220	Utilities					500
230	Equipment Rental					
240	Repair & Maintenance					
260	Miscellaneous Services	100		100		200
310	Office Supplies	125		125		100
320	Operating Supplies					
330	Repair & Maint. Supplies					
340	Minor Equipment & Tools					
350	Clothing & Uniforms					
380	Other Commodities-External					
410	Education					
420	Local Travel	3,756		1,344		800
430	Out-of-Town Travel					
440	Space Rental					
450	Interest					
460	Refunds					
470	Retirement System Payments					
490	Miscellaneous					
510	Fleet Services					
520	Printing Services	200		200		100
530	Distribution Services					
540	Electronic Services					
550	Data Processing Services					
560	Insurance					
570	Telephone Services	1,355		1,005		205
580	Intra-Fund Services					
590	Other Services-Internal					
200- 500	Total Materials & Services	5,536	160	2,774		2,223
610	Land					
620	Buildings					
630	Improvements					
640	Furniture & Equipment					
600	Total Capital Outlay					
700	Other					
	TOTAL	32,774	3,001	30,012	466	4,658

Contract #18585
 East County Aging District Services
 MCCA
 7/1/81 - 6/30/82

**APPROPRIATION UNIT
 LINE ITEM WORKSHEET**

151796

Code	Object Title	C/C General Fund/Education Administration	C/C General Fund Education Services	C/C General Fund/Recreation Administration	C/C General Fund Recreation Services	Total City Support
110	Full-Time Employees	989	8,013	1,386	13,953	108,181
120	Part-Time Employees					
130	Federal Program Enrollees					
140	Overtime					
150	Premium Pay					
170	Benefits	161	1,763	344	3,204	24,367
190	Less-Labor Turnover					
100	Total Personal Services	1,150	9,776	1,730	17,157	132,548
210	Professional Services	316	759	474	759	3,736
220	Utilities		1,874		1,874	4,248
230	Equipment Rental					
240	Repair & Maintenance					
260	Miscellaneous Services		400		400	1,400
310	Office Supplies		160		160	880
320	Operating Supplies					
330	Repair & Maint. Supplies					
340	Minor Equipment & Tools					
350	Clothing & Uniforms					
380	Other Commodities—External					
410	Education					
420	Local Travel		700		700	7,300
430	Out-of-Town Travel					
440	Space Rental					
450	Interest					
460	Refunds					
470	Retirement System Payments					
490	Miscellaneous					
510	Fleet Services					
520	Printing Services		200		200	1,100
530	Distribution Services					
540	Electronic Services					
550	Data Processing Services					
560	Insurance					
570	Telephone Services		795		790	5,810
580	Intra-Fund Services					
590	Other Services—Internal					
200- 500	Total Materials & Services	316	4,888	474	4,883	24,474
610	Land					
620	Buildings					
630	Improvements					
640	Furniture & Equipment					
600	Total Capital Outlay					
700	Other					
	TOTAL	1,466	14,664	2,204	22,040	157,022

Contract No. 18565
 East County - Aging District Services
 MCCA

7/1/81 - 6/30/82

APPROPRIATION UNIT 151796
 LINE ITEM WORKSHEET

Code	Object Title	Cash Match Education Services	Cash Match Recreation Services	In-Kind Match Education Services	In-Kind Match Recreation Services	Total Match
110	Full-Time Employees					
120	Part-Time Employees					
130	Federal Program Enrollees					
140	Overtime					
150	Premium Pay					
170	Benefits					
190	Less-Labor Turnover					
100	Total Personal Services					
210	Professional Services					
220	Utilities	50	202			252
230	Equipment Rental					
240	Repair & Maintenance	50	150			200
260	Miscellaneous Services	1,040	4,160	150	574	5,924
310	Office Supplies					
320	Operating Supplies	75	299			374
330	Repair & Maint. Supplies					
340	Minor Equipment & Tools					
350	Clothing & Uniforms					
380	Other Commodities-External	100	400			500
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	120	480			600
530	Distribution Services					
540	Electronic Services					
550	Data Processing Services					
560	Insurance					
570	Telephone Services		874			874
580	Intra-Fund Services					
590	Other Services-Internal					
200-500	Total Materials & Services	1,435	6,565	150	574	8,724
610	Land					
620	Buildings					
630	Improvements					
640	Furniture & Equipment					
600	Total Capital Outlay					
700	Other					
	TOTAL	1,435	6,565	150	574	8,724

5/1/81

Contract No. 18565

East County Aging District Services

MCCAA

7/1/81 - 6/30/82

APPROPRIATION UNIT
LINE ITEM WORKSHEET

151796

Code	Object Title	Other Resources In-Kind	Total Contract			
110	Full-Time Employees	32,323	140,504			
120	Part-Time Employees					
130	Federal Program Enrollees					
140	Overtime					
150	Premium Pay					
170	Benefits	7,111	31,478			
190	Less-Labor Turnover					
100	Total Personal Services	39,434	171,982			
210	Professional Services		3,736			
220	Utilities		4,500			
230	Equipment Rental					
240	Repair & Maintenance		200			
260	Miscellaneous Services		7,324			
310	Office Supplies		880			
320	Operating Supplies		374			
330	Repair & Maint. Supplies					
340	Minor Equipment & Tools					
350	Clothing & Uniforms					
380	Other Commodities—External		500			
410	Education					
420	Local Travel		7,300			
430	Out-of-Town Travel					
440	Space Rental					
450	Interest					
460	Refunds					
470	Retirement System Payments					
490	Miscellaneous					
510	Fleet Services					
520	Printing Services		1,700			
530	Distribution Services					
540	Electronic Services					
550	Data Processing Services					
560	Insurance					
570	Telephone Services		6,684			
580	Intra-Fund Services					
590	Other Services—Internal					
200- 500	Total Materials & Services		33,198			
610	Land					
620	Buildings					
630	Improvements					
640	Furniture & Equipment					
600	Total Capital Outlay					
700	Other					
	TOTAL	39,434	205,180			5/1/80

151796

CONTRACT NO. 18565

DATE May 1, 1981

AGENCY Multnomah County Community Action Agency

Information and Referral Administration
Service Category (if applicable)

FUNDING SOURCE III-B

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

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CONTRACT NO. 18565

DATE May 1, 1981

AGENCY Multnomah County Community Action Agency

Information and Referral
Service Category (if applicable)

FUNDING SOURCE III-B

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

PERSONNEL

151796

DATE May 1, 1981

AGENCY Multnomah County Community Action Agency

Needs Assessment - Administration
Service Category (if applicable)

FUNDING SOURCE III-B

[illegible]

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

PERSONNEL

151798

DATE May 1, 1981

Needs Assessment

FUNDING SOURCE III-B

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

PERSONNEL

151796

DATE May 1, 1981

AGENCY Multnomah County Community Action Agency

Case Management Level I - Administration
Service Category (if applicable)

FUNDING SOURCE III-B

[illegible]

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

PERSONNEL

PERSONNEL

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DATE May 1, 1981

Case Management Level II - Administration
Service Category (if applicable)

FUNDING SOURCE C/C General Fund

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

PERSONNEL

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DATE May 1, 1981

AGENCY Multnomah County Community Action Agency

Case Management Level II
Service Category (if applicable)

FUNDING SOURCE C/C 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	Human Services Tech. II	7.86/1,368	45	2.60	1,601
1	Human Services Tech. II	8.10/1,409	45	9.40	5,960
1	Human Services Tech. II	7.44/1,295	45	4.50	2,622
1	Human Services Tech. II	7.65/1,331	45	7.50	4,492
1	Human Services Tech. II	7.86/1,368	45	7.50	4,617
1	Human Services Tech. II	8.10/1,409	45	4.50	2,853
SUB-TOTAL, PERSONNEL					22,145
* % FRINGE BENEFITS					5,093
TOTAL, PERSONNEL					27,238

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

PERSONNEL

151796

DATE May 1, 1981

AGENCY Multnomah County Community Action Agency

Outreach - Administration

FUNDING SOURCE C/C General Fund

Service Category (if applicable)

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

PERSONNEL

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DATE May 1, 1981

District Services - Outreach

Service Category (if applicable)

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

PERSONNEL

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Service Category (if applicable)

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

PERSONNEL

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DATE May 1, 1981

District Services - Education

Service Category (if applicable)

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

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CONTRACT NO. 18565

DATE May 1, 1981

PROJECT TITLE East County Aging District Services

AGENCY Multnomah County Community Action Agency

Recreation - Administration

FUNDING SOURCE C/C General Fund

Service Category (if applicable)

	SUB-TOTAL, PERSONNEL	1,386
25	* % FRINGE BENEFITS	344
	TOTAL, PERSONNEL	1,730

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PERSONNEL

DATE May 1, 1981

District Services - Recreation

Service Category (if applicable)

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

CONTRACT BUDGET JUSTIFICATION

PERSONNEL

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CONTRACT NO: 18565

DATE 5/1/81

PROJECT TITLE East County Aging District Services

AGENCY Multnomah County Community Action Agency

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	Program Coordinator	9.83/1,710	35	3	1,795
1	Program Coordinator	10.29/1,791	35	9	5,641
1	Program Coordinator	9.83/1,710	57	8.5	8,285
1	Program Coordinator	10.29/1,791	57	1.5	1,531
1	Human Services Tech. I	6.07/1,056	100	12	12,672
1	Office Assistant I	5.63/980	100	5.25	5,145
1	Office Assistant I	5.96/1,037	100	6.75	7,000
1	Human Services Tech. II	7.86/1,368	100	2.60	3,558
1	Human Services Tech II	8.10/1,409	100	9.40	13,244
1	Human Services Tech II	7.44/1,295	100	4.50	5,827
1	Human Services Tech II	7.65/1,331	100	7.50	9,982
1	Human Services Tech II	7.86/1,368	100	7.50	10,260
1	Human Services Tech II	7.10/1,409	100	4.50	6,340
1	Program Coordinator	10.59/1,843	57	7.15	7,511

SUB-TOTAL, PERSONNEL

* % FRINGE BENEFITS

TOTAL, PERSONNEL

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

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DATE 5/1/81

AGENCY Multnomah County Community Action Agency

Service Category (if applicable)

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

CONTRACT BUDGET JUSTIFICATION

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MATERIALS AND SERVICES

CONTRACT NO. 18565

DATE May 1, 1981

PROJECT TITLE East County Aging District Services

AGENCY Multnomah County Community Action Agency

Information & Referral - Administration
Service Category (if applicable)

FUNDING SOURCE III-B

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
210	Program prorated share of independent audit	428	428

CONTRACT BUDGET JUSTIFICATION

MATERIALS AND SERVICES

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CONTRACT NO. 18565

DATE May 1, 1981

PROJECT TITLE East County Aging District Services

AGENCY Multnomah County Community Action Agency

Information & Referral Services
Service Category (if applicable)

FUNDING SOURCE III-B

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
520	Program share of printing and reproduction costs, use of agency copy machine	200	200
260	Postage charges for client mailing of program information and charges for mailing of program reports	100	100
310	Consumable office supplies for program staff	125	125
570	Program prorated share of telephone charges in AAA program. Charge based on 13 phones x 12 months x \$35 per month, plus \$350 miscellaneous service charges for calls out of service area.	1,360	1,360

MATERIALS AND SERVICES

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DATE May 1, 1981

AGENCY Multnomah County Community Action Agency

FUNDING SOURCE III-B

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CONTRACT BUDGET JUSTIFICATION

MATERIALS AND SERVICES

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CONTRACT NO. 18565

DATE May 1, 1981

PROJECT TITLE East County Aging District Services

AGENCY Multnomah County Community Action Agency

Needs Assessment

Service Category (if applicable)

FUNDING SOURCE III-B

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
260	Postage charges for mailing of program reports and information	100	100
310	Consumable office supplies for program staff	85	85
570	Program prorated share of telephone charges in AAA program. Charge based on 13 phones x 12 months x \$35 per month, plus \$350 miscellaneous service charges for calls out of service area.	300	300

CONTRACT BUDGET JUSTIFICATION

MATERIALS AND SERVICES

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CONTRACT NO. 18565

DATE May 1, 1981

PROJECT TITLE East County Aging District Services

AGENCY Multnomah County Community Action Agency

Case Management I - Administration

Service Category (if applicable)

FUNDING SOURCE III-B

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
210	Program prorated share of independent audit	436	436

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CONTRACT BUDGET JUSTIFICATION MATERIALS AND SERVICES

DATE May 1, 1981CONTRACT NO. 18565PROJECT TITLE East CountyAging District ServicesAGENCY Multnomah County Community Action AgencyCase Management I

Service Category (if applicable)

FUNDING SOURCE III-B

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
260	Program share of printing and reproduction costs, use of agency copy machine	200	300
260	Postage charges for program report mailing	100	125
310	Consumable office supplies for program staff	125	3,756
420	Prorated reimbursement for use of personal auto by staff performing home visits. Rate based on Local 88 union contract requirements.	3,756	
570	Program prorated share of telephone charges in AAA program. Charge based on 13 phones x 12 months x \$35 per month, plus \$350 miscellaneous service charges for calls out of service area.	1,355	1,355

CONTRACT BUDGET JUSTIFICATION

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MATERIALS AND SERVICES

CONTRACT NO. 18565DATE May 1, 1981PROJECT TITLE East County Aging District ServicesAGENCY Multnomah County Community Action AgencyCase Management I
Service Category (if applicable)FUNDING SOURCE III-B

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
260	Program share of printing and reproduction costs, use of agency copy machine	200	
260	Postage charges for program report mailing	100	300
310	Consumable office supplies for program staff	125	125
420	Prorated reimbursement for use of personal auto by staff performing home visits. Rate based on Local 88 union contract requirements	3,756	3,756
570	Program prorated share of telephone charges in AAA program. Charge based on 13 phones x 12 months x \$35 per month, plus \$350 miscellaneous service charges for calls out of service area.	1,355	1,355

CONTRACT BUDGET JUSTIFICATION

MATERIALS AND SERVICES

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CONTRACT NO. 18565

DATE May 1, 1981

PROJECT TITLE East County Aging District Services

AGENCY Multnomah County Community Action Agency

Case Management II - Administration
Service Category (if applicable)

FUNDING SOURCE III-B

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
210	Program prorated share of independent audit	160	160

CONTRACT BUDGET JUSTIFICATION

MATERIALS AND SERVICES

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CONTRACT NO. 18565

DATE May 1, 1981

PROJECT TITLE East County Aging District Services

AGENCY Multnomah County Community Action Agency

Case Management II

Service Category (if applicable)

FUNDING SOURCE C/C General Fund

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
520	Program share of printing and reproduction costs, use of agency copy machine	200	200
260	Postage charges for program report mailing	100	100
310	Consumable office supplies for program staff	125	125
420	Prorated reimbursement for use of personal auto by staff performing home visits. Rate based on Local 88 union contract requirements.	1,344	1,344
570	Program prorated share of telephone charges in AAA program. Charge based on 13 phones x 12 months x \$35 per month, plus \$350 miscellaneous service charges for calls out of service area.	1,005	1,005

CONTRACT BUDGET JUSTIFICATION

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MATERIALS AND SERVICES

CONTRACT NO. 18565DATE May 1, 1981PROJECT TITLE East County Aging District ServicesAGENCY Multnomah County Community Action AgencyOutreach - ServicesService Category (if applicable)FUNDING SOURCE C/C General Fund

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
210	Prorated program share of janitorial charges for Errol Heights Senior Center	318	318
220	Prorated program reimbursement to Errol Heights Methodist Church for utility charges incurred in operation of senior center	500	500
520	Program share of printing and reproduction costs, use of agency copy machine	100	100
310	Consumable office supplies for program staff	100	100
420	Prorated reimbursement for use of personal auto by staff performing program business in field. Rate based on Local 88 union contract requirements.	800	800
240	Prorated janitorial and utility charges for Gresham Senior Center	200	200
570	Program prorated share of telephone charges in AAA program. Charge based on 13 phones x 12 months x \$35 per month, plus \$350 miscellaneous service charges for calls out of service area.	205	205

MATERIALS AND SERVICES

151796

DATE May 1, 1981

Education - Administration

FUNDING SOURCE C/C General Fund

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CONTRACT BUDGET JUSTIFICATION

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MATERIALS AND SERVICES

CONTRACT NO. 18565

DATE May 1, 1981

PROJECT TITLE East County Aging District Services

AGENCY Multnomah County Community Action Agency

Education

Service Category (if applicable)

FUNDING SOURCE C/C General Fund

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
210	Prorated program share of janitorial charges for Errol Heights Senior Center	759	759
220	Prorated program reimbursement to Errol Heights Methodist Church for utility charges incurred in operation of senior center	1,874	1,874
520	Program share of printing and reproduction costs, use of agency copy machine	200	200
310	Consumable office supplies for program staff	160	160
420	Prorated reimbursement for use of personal auto by staff performing program business in field. Rate based on Local 88 union contract requirements.	700	700
260	Prorated janitorial and utility charges for Gresham Senior Center	400	400
570	Program prorated share of telephone charges in AAA program. Charge based on 13 phones x 12 months x \$35 per month, plus \$350 miscellaneous service charges for calls out of service area	795	795

MATERIALS AND SERVICES

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DATE May 1, 1981

AGENCY Multnomah County Community Action Agency

Recreation - Administration

FUNDING SOURCE C/C General Fund

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CONTRACT BUDGET JUSTIFICATION

MATERIALS AND SERVICES

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CONTRACT NO. 18565

DATE May 1, 1981

PROJECT TITLE East County Aging District Services

AGENCY Multnomah County Community Action Agency

Recreation

Service Category (if applicable)

FUNDING SOURCE C/C General Fund

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
210	Prorated program share of janitorial charges for Errol Heights Senior Center	759	759
220	Prorated program reimbursement to Errol Heights Methodist Church for utility charges incurred in operation of senior center	1,874	1,874
520	Program share of printing and reproduction costs, use of agency copy machine	200	200
310	Consumable office supplies for program staff	160	160
420	Prorated reimbursement for use of personal auto by staff performing program business in field. Rate based on Local 88 union contract requirements.	700	700
260	Prorated janitorial and utility charges for Gresham Senior Center	400	400
570	Program prorated share of telephone charges in AAA program. Charge based on 13 phones x 12 months x \$35 per month, plus \$350 miscellaneous service charges for calls out of service area.	790	790

CONTRACT BUDGET JUSTIFICATION

MATERIALS AND SERVICES

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CONTRACT NO. 18565

DATE May 1, 1981

PROJECT TITLE East County Aging District Services

AGENCY Multnomah County Community Action Agency

Service Category (if applicable)

FUNDING SOURCE Total City Support

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
210	Independent audit charge prorated to various program administration	1,900	
210	Janitorial services for Errol Heights Senior Center prorated to programs housed in that location	1,836	3,736
220	Reimbursement to Errol Heights Methodist Church for utility charges incurred in operation of senior center, prorated to programs housed in that location	4,248	4,248
260	Postage charges for client mailing of program information and mailing of program reports	400	400
520	Program share of printing and reproduction costs, use of agency copy machine	1,100	1,100
310	Consumable office supplies for program staff	880	880
420	Reimbursement for use of personal auto by staff performing home visits, outreach services, program business, attending AAA meetings, etc. Rate based on Local 88 contract.	7,300	7,300
260	Janitorial and utility charges for Gresham Senior Center prorated to programs housed in that location	1,000	1,000
570	Senior program telephone charges prorated to programs by use. Charges based on 13 phones x 12 months x \$35 per month, plus \$350 miscellaneous service charges for calls out of service area.	5,810	5,810

CONTRACT BUDGET JUSTIFICATION

MATERIALS AND SERVICES

151796

CONTRACT NO. 18565DATE May 1, 1981PROJECT TITLE East County Aging District ServicesAGENCY Multnomah County Community Action AgencyEducation Services
Service Category (if applicable)FUNDING SOURCE Cash match

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
220	Balance of utility charges for Errol Heights Senior Center	50	50
240	Repair and maintenance of appliances used in operation of senior centers	50	50
520	Printing charges for senior newsletter	120	120
260	Postage to mail senior newsletter	40	40
320	Educational material used in classes	75	75
380	Supplies for volunteer recognition	100	100
260	Balance of prorated janitorial, utility and maintenance charges for Gresham Senior Center	1,000	1,000

CONTRACT BUDGET JUSTIFICATION

MATERIALS AND SERVICES

151796

CONTRACT NO. 18565

DATE May 1, 1981

PROJECT TITLE East County Aging District Services

AGENCY Multnomah County Community Action Agency

Recreation Services

Service Category (if applicable)

FUNDING SOURCE Cash match

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
220	Balance of prorated utility charges for Errol Heights Senior Center	202	202
240	Repair and maintenance of appliances used in operation of senior centers	150	150
520	Printing charges for senior newsletter	480	480
260	Postage to mail senior newsletter	160	160
320	Arts and crafts supplies used in recreational activities	299	299
380	Supplies for volunteer recognition	400	400
260	Balance of prorated janitorial, utility, and maintenance charges for Gresham Senior Center	4,000	4,000
570	Telephone for Gresham senior travel planning activity, including long distance charges	874	874

CONTRACT BUDGET JUSTIFICATION

151796

MATERIALS AND SERVICES

CONTRACT NO. 18565

DATE 5/1/81

PROJECT TITLE East County Aging District Services

AGENCY MCCAA

In-Kind Match Education Services

Service Category (if applicable)

FUNDING SOURCE Multnomah County

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
440	Rental value of portion of Gresham Senior Center used by program	150	150

CONTRACT BUDGET JUSTIFICATION

MATERIALS AND SERVICES

151796

CONTRACT NO. 18565

DATE 5/1/81

PROJECT TITLE East County Aging District Services

AGENCY MCCAA

In-Kind Match Recreation Services

Service Category (if applicable)

FUNDING SOURCE Multnomah County

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
440	Rental value of portion of Gresham Senior Center used by program	574	574

CONTRACT BUDGET JUSTIFICATION

151796

MATERIALS AND SERVICES

CONTRACT NO. 18565

DATE 5/1/81

PROJECT TITLE East County Aging District Services

AGENCY MCCAA

Service Category (if applicable)

FUNDING SOURCE Total Match

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
220	Balance of prorated utility charges for Errol Heights Senior Center.	252	252
260	Repair and maintenance of appliances used in operation of the senior center.	200	200
520	Printing charges for senior newsletter.	600	600
260	Postage to mail senior newsletter	200	200
320	Educational material used in classes.	75	
320	Arts and crafts supplies used in recreational activities.	299	374
380	Supplies for volunteer recognition	500	500
260	Balance of prorated janitorial, utility and maintenance charges for the Gresham Senior Center	5,000	
440	Rental value of portion of Gresham Senior Center used by programs.	724	5,724
570	Telephone for Gresham Senior travel planning activity, including long distance charges.	874	874

CONTRACT BUDGET JUSTIFICATION

Page 1

151796

MATERIALS AND SERVICES

CONTRACT NO. 18565

DATE May 1, 1981

PROJECT TITLE East County Aging District ServicesAGENCY Multnomah County Community Action Agency

Service Category (if applicable)

FUNDING SOURCE Total contract

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
210	Independent audit charge prorated to various program administration	1,900	
210	Janitorial services for Errol Heights Senior Center prorated to programs in that location	1,836	3,736
220	Reimbursement to Errol Heights Methodist Church for utility charges incurred in operation of senior center programs housed in that location	4,500	4,500
240	Repair and maintenance of appliances in operation of senior centers	200	200
260	Postage charge for client mailing of program information and mailing of program reports	400	
260	Postage to mail senior newsletter	200	600
260	Printing charges for senior newsletter	600	
260	Program share of printing and reproduction costs, use of agency copy machine	1,100	1,700
310	Consumable office supplies for program staff	880	880
320	Educational material and arts and crafts supplies used in classes	374	374
380	Supplies for volunteer recognition	500	500
420	Reimbursement for use of personal autos by staff performing home visits, outreach services, program business, attending AAA meetings, etc. Rate based on Local 88 contract.	7,300	7,300
260	Janitorial and utility charges for Gresham Senior Center prorated to programs housed in that location.	6,000	

CONTRACT BUDGET JUSTIFICATION

page 2
151796

MATERIALS AND SERVICES

CONTRACT NO. 18565

DATE May 1, 1981

PROJECT TITLE East County Aging District Services

AGENCY Multnomah County Community Action Agency

Service Category (if applicable)

FUNDING SOURCE Total contract

CODE	DESCRIPTION OF ITEM AND BASIS FOR EVALUATION	ITEM TOTAL	CATEGORY TOTAL
440	Rental value of portion of Gresham Senior Center used by programs.	724	6,724
570	Senior program telephones prorated to programs by use—13 phones x 12 months x \$35 per month, plus long distance charges for calls out of service area	5,810	
570	Telephone for Gresham senior travel planning activity including long distance charges	874	6,684

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

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

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

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

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

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

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

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

Dated this 20th day of April, 1984.

By

Mary Lou Jacobs

Title Executive Director

4420 S. E. 64th Avenue
Portland, OR 97206

Contractor's mailing address

151796

ASSURANCE OF COMPLIANCE
WITH THE CITY OF PORTLAND
AFFIRMATIVE ACTION PLAN

MCCAA

(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 April 29, 1981

By

Mary Lou Jacobs

4420 S. E. 64th Avenue
(Contractor's mailing address)

Title Executive Director

Portland, OR 97206

B-50

ATTACHMENT

151796

The Board of Directors of the East County Aging
Services District in Portland/Multnomah County has reviewed the proposal
for District Center Services to be provided by MCCAA
in the East County Services 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.

Lea Wikman
Signature of Board Chairperson

Lea Wikman

4/27/81

Date

EXHIBIT C

Required Reporting Forms
and
Procedures

OPEN ACCESS SERVICES FOR THE MONTH OF _____

151796

EAST AGING DISTRICT SERVICES

I. Information and Referral

This Month

YTD

- A. Number of simple information requests _____
- B. Number of complex information requests _____
- C. Number of simple referrals _____
- D. Number of complex referrals _____

_____	_____
_____	_____
_____	_____
_____	_____

II. District Services

A. Outreach

Number of individuals located _____

_____	_____
-------	-------

B. Friendly Visiting

1. Number of friendly visits _____
2. Number of individuals _____
3. Number of new individuals _____

_____	_____
_____	_____
_____	_____

C. Education

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

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Number of events this month _____ YTD _____

157796

D. Recreation

[illegible]

Number of events this month_____ YTD_____

Volunteers:

Estimated number of 60+ volunteers _____

Estimated number of minority volunteers _____

Authorized Signature

Date _____

ONCE PRINTED, REVISED

CLIENT TRACKING SYSTEM

FORMS 101 - 102 - 103

WILL BE SENT TO CONTRACTOR

INFORMATION TALLY SHEET

AAA 211 (Revised 6/79)

151226

Completed by: _____

Month _____

TYPE OF CONTACT

Phone:	Walk-in:	Other:	Total:
--------	----------	--------	--------

TYPE OF SERVICE PROVIDED

Info/simple:	Info/complex:	Other:
--------------	---------------	--------

SOURCE OF CONTACT

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

Disposition of Request

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

REFERRAL LOG

Agency _____

Date _____
Month _____ Year _____

[illegible]

154-208

151796

AREA AGENCY ON AGING
CLIENT REPRESENTATIVE
RECEIPT

PART A

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

Store or place of business:

Amount of funds:

Check \$ _____

Cash \$ _____

Agreed, the above is correct information

Signature of Client Representative _____

Agency _____

Signature of Client _____

Date: _____

(Client's Copy)

PART B

Describe items purchased, or bill paid:

Store or place of business:

Amount of funds returned to client:

\$ _____

Agreed the above is correct information.

Signature of Client Representative _____

Agency _____

Signature of Client _____

Date: _____

(Client's Copy)

REQUEST FOR WAIVER

1. _____ Name of Agency requesting waiver	2. Type of request <input type="checkbox"/> New <input type="checkbox"/> Review	3. Criteria to be waived Income <input type="checkbox"/> OPI Guidelines <input type="checkbox"/> AAA Guidelines <input type="checkbox"/> Age <input type="checkbox"/> Living Arrangement <input type="checkbox"/> Other Agency <input type="checkbox"/> Other _____ Specify
4. _____ Name of Client	5. _____ CTS Case Number	
6. Briefly describe the situation. (Attach a copy of the latest 101 & 102)		

7. Resources Investigated

Services Requested

Outcome

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

DO NOT WRITE BELOW THIS LINE

10. Request is: Approved <input type="checkbox"/> AAA <input type="checkbox"/> OPI	Temporarily <input type="checkbox"/> AAA Approved <input type="checkbox"/> OPI _____ Date	Denied <input type="checkbox"/> AAA <input type="checkbox"/> OPI
11. <u>Comments:</u>		

Signature of Reviewer

Date

151796

Contract Agency _____

Address _____

City _____ State _____

Contract # _____ Contract Period: From _____ To _____

Funding Source _____ Service Category _____

Reimbursement Request for _____
month & year

CODE	OBJECT TITLE	CURRENT PERIOD REQUEST	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 _____

Revised 4/3/81

**THE CITY OF
PORTLAND**



OREGON

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

Date Signed _____

Phone Number _____

Revised 6/2/81

81 7576

THE CITY OF PORTLAND



OREGON

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

Date Signed _____

Phone Number _____

Revised 6/2/81

75426

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

151786

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.)

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

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.

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.

PORTLAND HUMAN RESOURCES BUREAU
SOCIAL SERVICES DIVISION

PROCEDURES FOR CONTRACT MODIFICATIONS

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.

- 75
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).

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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
revised total source changes)

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.

AGREEMENT AMENDING CONTRACT No. 18217

151796

This agreement is entered into between the City of Portland, Oregon and PACT Senior Center, Contractor.

The parties have previously executed a contract providing for district senior center services for the elderly in Portland, Multnomah County for the period September 1, 1979 through June 30, 1983 which contract is known as Contract No. 18217. The contract shall now be amended by the addition of a budget in the amount not to exceed \$192,933 and the addition of new objectives, to continue district senior center services during the period July 1, 1981 through June 30, 1982.

The parties therefore agree that Contract No. 18217 is amended as follows:

1. The budget is amended by the addition of funds as follows to be expended during the period July 1, 1981 through June 30, 1982, similar in form to Exhibit A.

<u>Service Components</u>	<u>Funding Source</u>	<u>Amount</u>
Information and Referral		
Administration	Title III-B	\$ 4,048
Services	Title III-B	40,173
Case Management I		
Administration	Title III-B	3,849
Services	Title III-B	37,941
Needs Assessment		
Administration	Title III-B	877
Services	Title III-B	9,579
Case Management Level II		
Administration	General Fund	3,552
Services	General Fund	31,932
Counseling		
Administration	General Fund	1,188
Services	General Fund	12,850
Counseling/Crisis Counseling		
Administration	General Fund	933
Services	General Fund	9,139
Recreation		
Administration	General Fund	398
Services	General Fund	4,462

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<u>Service Components</u>	<u>Funding Source</u>	<u>Amount</u>
Outreach		
Administration	General Fund	656
Services	General Fund	5,650
Escort		
Administration	General Fund	2,544
Services	General Fund	23,253
Match - \$10,736	Total City Support	\$192,933

2. Objectives are amended under this agreement for the period July 1, 1981 through June 30, 1982 similar in form to Exhibit A.
3. Terms and conditions are deleted, added and modified as shown in Appendix I.
4. The total compensation for the period July 1, 1981 through June 30, 1982 shall not exceed \$192,933. An advance shall be made to cover the cost of the Contractor's initial expenses for operation not to exceed the sum of \$32,155.
5. Required reporting forms as shown in Exhibit A shall be utilized for reporting services provided under this contract.
6. These changes are incorporated in Contract No. 18217, similar in form to Exhibit A.

Dated this _____ day of _____, 1981.

Approved as to content:

PACT SENIOR CENTER

Erma E. Hyburn

Executive Director
Human Resources Bureau

Title: _____

Date: _____

Approved as to Form:

CITY OF PORTLAND

City Attorney

Commissioner of Public Utilities

Date: _____

Auditor

Date: _____

151796

MODIFIED TERMS AND CONDITIONS
as of
July 1, 1981

TERMS AND CONDITIONS

151796

The following terms and conditions are omitted:

Section IX: Special Conditions

- C. The Contractor shall assure that older persons shall not be discriminated against and that older persons shall be employed on a part-time and full-time basis in carrying out programs, to the degree feasible and subject to the provisions of approved personnel policies.
- D. The Contractor shall conform to the Client Representative Policy and the client confidentiality policy as set forth by the City.
- H. The Contractor shall employ City descriptions, policies and procedures for the delivery, utilization and coordination of information, referral, case management, escort, transportation, homemaker, housekeeper, legal, nutrition and other contracted services provided as part of the Portland/Multnomah County Area Agency on Aging Service System.
- I. The Contractor shall complete the client tracking system forms for all clients accepted for case management services, which includes the client information form, the needs assessment form and the client service form, to be submitted to the City by 3:00 P.M. on the 5th working day of each month.
- J. The Contractor shall conform to State, Federal and local laws and City policies and procedures governing service delivery and eligibility for service. Contractor agrees to comply with Oregon Project Independence Administrative Rules for services funded under Oregon Project Independence and to utilize the established fee schedule and other policies and procedures established by the City for the implementation of Oregon Project Independence requirements.
- K. The Contractor shall provide information services upon request. In the event a client needs extended services and/or case planning, then the client is to be referred to the District Area Agency on Aging Contractor responsible in accordance with established Aging Services District boundaries.
- O. The Contractor shall assure that all older persons in the Aging Services District have reasonably convenient access to information and referral services.

The following terms and conditions are modified to read as follows:

151796

Section IV. Agreed Contractor: Project Operation

- C. Contractor shall provide a minimum 10% match against Title III-B \$10,719 as approved in the budget (refer to Exhibit "B"). Failure to meet this requirement shall result in a reduction of budget termination of contract.

Section VI: Agreed City

- G. City shall conduct on-site contract and facility reviews in accordance with a schedule developed by City.

Section VII.

- 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 sole responsibility of the Contractor.) Payments shall also be delayed, if the required program reports are not received by the specified time.
- 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.

Section IX: Special Conditions

In Place of Section Q:

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;

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- (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 the delivery of service.

In Place of Section M:

- 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.

In Place of Section R:

- K. Contractor shall continue or initiate efforts to obtain support from other sources.

The following Terms and Conditions are added:

Section VII: Compensation: Method of Payment

- K. 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.

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- L. 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

B. - 5

that the Contractor has qualified (a) as a direct responsibility employer under 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.

Section IX: Special Conditions

- N. No employee of the Contractor or member of the Contractor's governing board or body or persons who exercise any responsibilities under this contract shall participate in any decision relating to this contract which affects his outside, personal pecuniary interests.
- T. 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.
- U. 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 9:00 A.M. of the date of change or closure.
- V. 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.

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- W. Contractor shall submit any corrections to monthly program reports and client tracking documents no later than 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 30 days from the end of the contract period.

PACT
81-82

151796

MODIFIED PROJECT NARRATIVE
as of
July 1, 1981

PROJECT APPLICATION
HUMAN RESOURCES BUREAU
City of Portland

EXHIBIT A 151798

1. Project Title PACT Southeast Senior Service Center

2. Type of Application (check one) New _____ Continuing x

3. Applicant Agency:

Name Portland Action Committees Together, Inc.

Address 3534 S.E. Main Street

Portland, Oregon 97214

Phone Number 233-8491

Project Director Bill Grossie

Official Authorized to Bind Agency Steve Citron

Financial Officer Carol Lentz

4. Contract Period: From 9 /1/79 To 6/30/83

5. Budget Period: From 7/1/81 To 6/30/82

6. City Support Requested \$192,933.00

151796

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 at 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.

1970 census data indicates that in this service area there are 24,585 residents over the age of 60. 8,282 of these individuals are over age 75. 4,131 have incomes below the poverty level, 6,170 of these individuals live alone, and 358 are minority. This totals 43,678 need units which comprises 25.8% of the total need in Multnomah County.

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

Project Goal:

To maintain a comprehensive service system designed to sustain independent and dignified living by providing access to information, referral, case management and supportive services for older persons living in Southeast Portland.

Project Narrative (con.)

Strategies for Delivering Services:

The PACT Senior Service Center. A neighborhood-based center shall function as a primary point of entrance to services and as a center for the development of social contact opportunities. The location of services on a neighborhood level will insure reasonably convenient access for all elderly and will encourage the development of programs and resources to reflect particular needs of residents in each service area. Information and referral will be available in response to telephone inquiries as well as office visits. Staff and volunteers will make outreach, case management, escort, counseling, crisis/emergency assistance, available to people in their own homes. Recreation events will be arranged at the center on a regular basis.

PACT Senior Service Center

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: The PACT Southeast Senior Service Center will provide services to elderly residents in Southeast Portland in the following census tracts: 1, 2, 3.01, 7.01, 8.01, 9.01, 9.02, 10, 11.01, 11.02, 12.01, 12.02, 13.01, 13.02, 14, 15, 16.01, 16.02, 17.01, 18.01, 18.02, 19, 20, 21. 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.

OBJECTIVE	PERFORMANCE INDICATORS	PROGRAM ELEMENTS/STAFFING PATTERNS
<p>1. Increase knowledge of services and resources for elderly residents by providing information (simple)* and information (complex)* services in response to 5,999 requests for information and assistance during the period July 1, 1981 - June 30, 1982.</p>	<p>Number of information (simple) services provided.</p> <p>Number of information (complex) services provided.</p>	<p>Maintain personnel to provide an information service.</p> <p>Staff: Program Director - .01</p> <p>Provide staff direction supervision; develop job descriptions and work programs; develop and implement a training program; and evaluate personnel.</p> <p>Staff: Program Director - .06 I & R Coordinator - .04 I & R Specialist - .01</p> <p>Maintain in conjunction with the Tri-County Community Council resource file an up-to-date file of services and resources available to older adults.</p> <p>Staff: I & R Specialist - .02 I & R Coordinator - .01</p> <p>Provide a readily identifiable and accessible communications center whereby individuals on a walk-in basis may inquire about and receive information on services and resources available to older adults.</p> <p>Staff: I & R Specialist - .10 I & R Coordinator - .05 Escort - .07</p> <p>Provide point of telephone contact where individuals can request and receive information about services available.</p> <p>Staff: I & R Specialist - .09 I & R Coordinator - .04 Escort - .05</p> <p>Respond to telephone, in person and correspondence requests by an older person, agency, or interest individual with accurate information pertinent to the request. In the case of simple information request no background information will be ascertained. In the case of complex information background information will be obtained, but no assessment or follow-up made. In both cases encouragement for re-contact by the inquirer will be made if initial information proved</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).

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OBJECTIVE	PERFORMANCE INDICATORS	PROGRAM ELEMENTS/STAFFING PATTERNS
<p>1. (con.) Increase knowledge of services and resources for elderly residents by providing information (simple)* and information (complex)* services in response to 5,999 requests for information and assistance during the period July 1, 1981 - June 30, 1982.</p>	<p>Number of information (simple) services provided.</p> <p>Number of information (complex) services provided.</p>	<p>(con.) incorrect or inappropriate.</p> <p>Staff: I & R Specialist - .35 FTE I & R Coordinator - .15 FTE Escort - .09 Supervisor Counselor - .05 FTE</p> <p>Provide written materials to community agencies and individuals informing them of services and resources available to older adults.</p> <p>Staff: I & R Specialist - .01 FTE I & R Coordinator - .05 FTE Escort - .01</p> <p>Develop and maintain communications network among social service agencies in Southeast Portland providing services to insure delivery of up-to-date accurate information.</p> <p>Staff: I & R Coordinator - .02 FTE Program Director - .01 FTE</p> <p>Provide newsletter containing information about services, resources, special events and activities.</p> <p>Staff: I & R Coordinator - .01 FTE Program Director - .01 FTE Volunteer - .02 Secretary - .02</p> <p>Develop community education presentation covering program services and procedures.</p> <p>Staff: I & R Coordinator - .01 FTE Program Director - .01 FTE</p> <p>Schedule community education presentations for Neighborhood organizations civic and service clubs.</p> <p>Staff : I & R Coordinator - .01 FTE</p>

OBJECTIVE

PERFORMANCE
INDICATORS

PROGRAM ELEMENTS/STAFFING PATTERNS

4. (con.) Increase knowledge of services and resources for elderly residents by providing information (simple)* and information (complex)* services in response to 5,999 requests for information and assistance during the period July 1, 1981 - June 30, 1982.

Number of assessments made for non-case management clients.

Number of unduplicated individuals receiving services.

Maintain record of clients identified through community education program,

Staff: I & R Coordinator - .01 FTE

Provide reports and maintain records or informational services to project administrator.

Staff: I & R Coordinator - .01 FTE
Program Director - .01 FTE

Monitor information services to insure contract compliance and quality of service.

Staff: Program Director - .01 FTE
I & R Coordinator - .01 FTE

Provide clerical support in the areas of typing, xeroxing and maintaining supplies.

Staff: Secretary - .02 FTE

JECTIVE

PERFORMANCE INDICATORS

PROGRAM ELEMENTS/STAFFING PATTERNS

↑ (con.) Increase knowledge of services and resources for elderly residents by providing information (simple)* and information (complex)* services in response to 5,999 requests for information and assistance during the period July 1, 1981 - June 30, 1982.

Number of assessments made for non-case management clients.

Number of unduplicated individuals receiving services.

Maintain clean and sanitary office area.

Staff: Janitor - .03 FTE

Provide on-going staff support to a district advisory comm. whose responsibilities include participation in on-going long term comprehensive planning activities.

Staff: Program Director - .01 FTE
Secretary - .005

Consult with PACT administrative staff on senior center issues.

Staff: Program Director - .0045 FTE
Executive Director - .0065 FTE

Submit required fiscal reports and invoices in the proper forms and manner.

Staff: Accountant - .0091 FTE
Accounting Clerk - .0325 FTE

Develop and maintain fundraising programs

Staff: Program Director - .01 FTE

PERFORMANCE INDICATORS

PROGRAM ELEMENTS/STAFFING PATTERNS

OBJECTIVE

2. Increase Access to needed services among elderly residents through the provision of referral (simple)* and referral (complex)* in response to 1302 requests for the period July 1, 1981 - June 30, 1982.

Number of referrals (simple) services provided.

Number of referrals (complex) services provided.

Provide personnel to provide a referral service.

Staff: Program Director - .01 FTE

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

Staff: Program Director - .04 FTE
I & R Coordinator - .02 FTE
I & R Specialist - .01 FTE

Accept referrals from agencies, individuals and other staff for older adults in need of referral services.

Staff: I & R Coordinator - .03 FTE
I & R Specialist - .05 FTE

An assessment will be made from each referral to determine the extent and type of need.

Staff: I & R Coordinator - .03 FTE
I & R Specialist - .07 FTE

Identify resources available and make determination of appropriate resources. On a simple referral inquiries will be directed to one or more appropriate resources.

Staff: I & R Coordinator - .05 FTE
I & R Specialist - .08 FTE
Escort - .03 FTE

On a complex referral contacts will be made with resource agency to assess current availability of resource and make appropriate referral.

Staff: I & R Specialist - .03 FTE
I & R Coordinator - .02 FTE
Sup. Counselor - .02 FTE

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

OBJECTIVE	PERFORMANCE INDICATORS	PROGRAM ELEMENTS/STAFFING PATTERNS
<p>2. (con.) Increase access to needed services among elderly residents through the provision of referral (simple* and referral (complex)* in response to 1302 requests for the period July 1, 1981 - June 30, 1982.</p>	<p>Number of referrals (simple) services provided.</p> <p>Number of referrals (complex) services provided.</p>	<p>Provide client with contact and advocate on their behalf when necessary.</p> <p>Staff: I & R Specialist - .03 FTE I & R Coordinator - .01 FTE Sup. Counselor - .01 FTE</p> <p>Develop and maintain informed network of provided agencies to facilitate referral of the elderly population by establishing interagency relationships.</p> <p>Staff: I & R Coordinator - .05 FTE I & R Specialist - .01 FTE</p> <p>Make follow-up contact with client or organization to whom referral has been made to ensure delivery of service.</p> <p>Staff: I & R Specialist - .03 FTE I & R Coordinator - .01 FTE Escort - .02 FTE Sup. Counselor - .01 FTE</p> <p>Provide assistance in locating or utilizing other services if follow-up indicates need.</p> <p>Staff: I & R Specialist - .03 FTE I & R Coordinator - .01 FTE Sup. Counselor - .01 FTE</p> <p>Resource files will be updated on the basis of information acquired during follow-up activities.</p> <p>Staff: I & R Specialist - .01 FTE</p> <p>Provide reports and maintain records on referral services to project administration.</p> <p>Staff: I & R Specialist - .01 FTE I & R Coordinator - .01 FTE Escort Aide - .01 FTE</p>

OBJECTIVE	PERFORMANCE INDICATORS	PROGRAM ELEMENTS/STAFFING PATTERNS
<p>2: (con.) Increase access to needed services among elderly residents through the provision of referral (simple)* and referral (complex)* in response to 1302 requests for the period July 1, 1981 - June 30, 1982.</p>	<p>Number of referrals (simple) services provided.</p> <p>Number of referrals (complex) services provided.</p>	<p>Monitor referral service to ensure contract compliance and quality of service.</p> <p>Staff: Program Director - .01 FTE I & R Coordinator - .01 FTE</p> <p>Provide clerical support in the areas of typing, xeroxing and maintaining supplies.</p> <p>Staff: Secretary - .03 FTE</p>

OBJECTIVE	PERFORMANCE INDICATORS	PROGRAM ELEMENTS/STAFFING PATTERNS
<p>2. (con.) Increase access to needed services among elderly residents through the provision of referral (simple)* and referral (complex)* in response to 1302 requests for the period July 1, 1981 - June 30, 1982.</p>	<p>Number of referrals (simple services provided.</p> <p>Number of referrals (complex) services provided.</p>	<p>Maintain clean and sanitary office area.</p> <p>Staff: Janitor - .03 FTE</p> <p>Provide on-going staff support to a district advisory comm. whose responsibilities include participation in on-going long term comprehensive planning activities.</p> <p>Staff: Program Director - .01 FTE Secretary - .005 FTE</p> <p>Consult with PACT Administrative staff on senior center issues.</p> <p>Staff: Program Director - .0045 FTE Executive Director - .0065 FTE</p> <p>Submit required fiscal reports and invoices in the proper forms and manner.</p> <p>Staff: Accountant -.009FTE Accounting Clerk - .325 FTE</p> <p>Develop and maintain fundraising programs.</p> <p>Staff: Program Director - .1 FTE</p>

OBJECTIVE

PERFORMANCE
INDICATORS

PROGRAM ELEMENTS/STAFFING PATTERNS

3. Improve access of all older people to services and community resources by the provision of a needs assessment in their homes of 165 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.

Number of hours of service provided.

Maintain personnel to provide individual needs assessment on-going.

Staff: Program Director - .01 FTE

Provide staff direction, supervision develop work program, develop and implement training program, evaluate personnel

Staff: Counselor II - .07 FTE

Program Director - .01 FTE

Complete comprehensive needs assessment on older individuals in their home which includes medical/social history, review elder clients living situation, service needs, resources available to the client, determination of eligibility for and available of community resources to meet individual needs, exploration of options and referral if appropriate.

Staff: Counselor II - .01 FTE

Counselor I - .10 FTE

Sr. Counselor - .05 FTE

Complete and submit client Tracking System form (101-102) as assessments only client.

Staff: Counselor I - .01 FTE

Sr. Counselor - .01 FTE

Counselor II - .01 FTE

Compile monthly and special reports as needed.

Staff: Counselor II - .01 FTE

Program Director - .01 FTE

Monitor Individual Needs Assessment activities to insure contract compliance and quality and quantity of service.

Staff: Program Director - .01 FTE

OBJECTIVE	PERFORMANCE INDICATORS	PROGRAM ELEMENTS/STAFFING PATTERNS
34 (con.) Improve access of all older people to services and community resources by the provision of a needs assessment in their homes of 165 unduplicated older people during the period of July 1, 1981 - June 30, 1982.	<p>Number of assessments made for non-case management clients.</p> <p>Number of unduplicated individuals receiving services.</p> <p>Number of hours of service provided.</p>	<p>Maintain clerical support for assigned staff.</p> <p>Staff: Secretary - .03 FTE</p> <p>Maintain clean and sanitary office area.</p> <p>Staff: Janitor - .03 FTE</p> <p>Provide on-going staff support to a district advisory comm. whose responsibilities include participation in on-going long term comprehensive planning activities.</p> <p>Staff: Program Director - .01 FTE Secretary - .005 FTE</p> <p>Consult with PACT Administrative staff on senior center issues.</p> <p>Staff: Program Director - .0045 FTE Executive Director - .002 FTE</p> <p>Submit required fiscal reports and invoices in the proper forms and manner.</p> <p>Staff: Accountant -.0028 FTE Accounting Clerk - .01 FTE</p> <p>Develop and maintain fundraising programs.</p> <p>Staff: Program Director - .1 FTE</p>

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OBJECTIVE

PERFORMANCE
INDICATORS

PROGRAM ELEMENTS/STAFFING PATTERNS

<p>4. Maintain access to needed services among elderly residents by providing 364 different individuals who meet the established needs criteria with 2,968 hours of Level I case management and with an average caseload of 274 during the period July 1, 1981 through June 30, 1982.</p>	<p>Number of different persons with a service plan.</p> <p>Number of different persons with overdue reassessments.</p> <p>Number of persons served.</p> <p>Number of hours of service provided.</p>	<p>Maintain personnel to provide case planning and case management services.</p> <p>Staff: Program Director - .01 FTE</p> <p>Provide staff direction/supervision develop work programs develop and implement a training program and evaluate personnel.</p> <p>Staff: Program Director - .11 FTE Counselor II - .04FTE</p> <p>Perform an interview with the client and assess client needs.</p> <p>Staff: Counselor II - .01 FTE Counselor I - .07 FTE Sr Counselor - .12 FTE</p> <p>Develop a written service plan for each client determined maintenance Level I and arrange for on-going maintenance services, linkage with other service providers.</p> <p>Staff: Counselor II - .01 FTE Counselor I - .07 FTE Sr. Counselor - .12 FTE</p> <p>Request waivers for all client applications not conforming to AAA guidelines for caseplanning and case management services.</p> <p>Staff: Counselor I - .02 FTE Counselor I - .02 FTE Sr. Counselor - .02 FTE</p>
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OBJECTIVE

PERFORMANCE INDICATORS

PROGRAM ELEMENTS/STAFFING PATTERNS

4. (con.) Maintain access to needed services among elderly residents by providing 364 different individuals who meet the established needs criteria with 2,968 hours of Level I case management and with an average caseload of 274 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 hours of service provided.

Conduct weekly staffing sessions to review case plans and progress of clients receiving services.

Staff: Program Director - FTE
Counselor II - .04 FTE
Counselor I - .01 FTE
Sr. Counselor - .01 FTE

Monitor client's personal living situation through visitation and telephone contact.

Staff: Volunteer - FTE

Establish a schedule for follow-up/monitoring of all client needs and contacts.

Staff: Counselor II - .02 FTE
Counselor I - .04 FTE
Sr. Counselor - .12 FTE

Maintain a case file on each maintenance (Level I) client.

Staff: Counselor II - .01 FTE
Counselor I - .07 FTE
Sr. Counselor - .12 FTE

Reassess each Level I Client on a regular basis (at least every 6 months) and prepare a written plan review for each reassessment.

Staff: Counselor II - .01 FTE
Counselor I - .07 FTE
Sr. Counselor - .12 FTE

OBJECTIVE

PERFORMANCE INDICATORS

PROGRAM ELEMENTS/STAFFING PATTERNS

4. (con.) Maintain access to needed services among elderly residents by providing 364 different individuals who meet the established needs criteria with 2,968 hours of Level I case management and with an average caseload of 274 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 hours of service provided.

Submit Client Tracking System (CTS) forms in a timely manner.

Staff: Counselor II - .04 FTE
Counselor I - .05 FTE
Sr. Counselor - .08 FTE
Practium Student -
Secretary - .05 FTE

Monitor case management I services to insure contract compliance and quality of service.

Staff: Program Director - .01 FTE

Provide clerical support in the areas of recordkeeping, typing, xeroxing, and maintenance of supplies.

Staff: Secretary - .20 FTE

Maintain clean and sanitary office area.

Staff: Janitor - .03 FTE

Provide on-going staff support to a district advisory committee whose responsibilities include participation in on-going long term comprehensive planning activities.

Staff: Program Director - .01 FTE
Secretary - .005 FTE

Consult with PACT Administrative staff on senior center issues.

Staff: Program Director - .0045 FTE
Executive Director - .0105 FTE

Submit required fiscal reports and invoices in the proper forms and manner.

Staff: Accountant - .0147 FTE
Accounting Clerk - .0525 FTE

Develop and maintain fundraising programs.

Staff: Program Director - .01 FTE

PERFORMANCE
INDICATORS

PROGRAM ELEMENTS/STAFFING PATTERNS

OBJECTIVE

5. Maintain access to needed services among elderly residents by providing 129 different individuals who meet the established needs criteria with 2180 hours of Level II case management and with an average caseload of 107 during the period July 1, 1981 through June 30, 1982.

Number of different persons with a case plan.

Number of different persons with overdue reassessments.

Number of persons served.

Number of hours of service provided.

Maintain personnel to provide case planning and case management services.

Staff: Program Director - .01 FTE

Provide personnel direction/supervision, develop work programs, develop and implement a training program and evaluate program staff.

Staff: Program Director - .09 FTE
Counselor II - .04 FTE

Perform an interview with the client and assess client needs

Staff: Counselor II - .01 FTE
Counselor I - .07 FTE
Sr. Counselor - .03 FTE

Develop a written case plan for each client determined Level II and arrange for support services to sustain independent living and linkage with appropriate service providers.

Staff: Counselor II - .01 FTE
Counselor I - .08 FTE
Sr. Counselor - .03 FTE

Request waivers for all client applications not conforming to AAA guidelines for case planning and case management services.

Staff: Counselor II - .02 FTE
Counselor I - .02 FTE
Sr. Counselor - .01 FTE

OBJECTIVE

PERFORMANCE
INDICATORS

PROGRAM ELEMENTS/STAFFING PATTERNS

5. (con.) Maintain access to needed services among elderly residents by providing 129 different individuals who meet the established needs criteria with 2,180 hours of Level II case management and with an average caseload of 107 during the period July 1, 1981 - June 30, 1982.

Number of different persons with a case plan.

Number of different persons with overdue reassessments.

Number of persons served.

Number of hours of service provided.

Submit Client Tracking System (CTS) forms in a timely manner.

Staff: Counselor II - .04 FTE
Counselor I - .05 STE
Sr. Counselor - .02 FTE
Practium Student -
Secretary - .05 FTE

Monitor case management II services to insure contract compliance and quality of service.

Staff: Program Director - .01 FTE

Provide clerical support in the areas of recordkeeping, typing, xeroxing and maintenance of supplies.

Staff: Secretary - .20 FTE

Maintain clean and sanitary office area.

Staff: Janitor - .03 FTE

Provide on-going staff support to a district advisory committee whose responsibilities include participation in on-going long term comprehensive planning activities.

Staff: Program Director - .01 FTE
Secretary - .005 FTE

Consult with PACT Administrative staff on senior center issues.

Staff: Program Director - .0045 FTE
Executive Director - .009 FTE

Submit required fiscal reports and invoices in the proper forms and manner.

Staff: Accountant - .0126 FTE
Accounting Clerk - .015 FTE

Develop and maintain fundraising programs.

Staff: Program Director - .1 FTE

OBJECTIVE

PERFORMANCE
INDICATORS

PROGRAM ELEMENTS/STAFFING PATTERNS

5. (con.) Maintain access to needed services among elderly residents by providing 129 different individuals who meet the established needs criteria with 2,180 hours of Level II case management and with an average caseload of 107 during the period July 1, 1981 - June 30, 1982.

Number of different persons with a case plan.

Number of different persons with overdue reassessments.

Number of persons served.

Number of hours of service provided.

Conduct weekly staffing sessions to review case plans and progress of clients receiving services.

Staff: Program Director - .025 FTE
Counselor II - .04 FTE
Counselor I - .01 FTE
Sr. Counselor - .01 FTE

Establish a schedule for follow-up monitoring of all client needs and contacts.

Staff: Counselor II - .02 FTE
Counselor I - .05 FTE
Sr. Counselor - .02 FTE

Monitor clients personal living situation through visitation and telephone contact.

Staff: Volunteer - .51 FTE

Maintain a case file on each Level II client.

Staff: Counselor II - .01 FTE
Counselor I - .08 FTE
Sr. Counselor - .03 FTE

Reassess each Level II client on a regular basis (at least every 3 mons.) and prepare a written plan review for each reassessment.

Staff: Counselor II - .01 FTE
Counselor I - .08 FTE
Sr. Counselor - .02 FTE

OBJECTIVE

PERFORMANCE
INDICATORS

PROGRAM ELEMENTS/STAFFING PATTERNS

6. To increase the access to and utilization of appropriate services by homebound, isolated and/or at risk elderly through the provision of 72 units of outreach services during the period July 1, 1981 - June 30, 1982.

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

Maintain personnel to provide outreach service.

Staff: Program Director - .01 FTE

Provide staff direction/supervision develop job description and work programs, develop and implement a training program and evaluate personnel.

Staff: Program Director - .01 FTE

Develop/update plan for canvassing the agency's district to seek out older adults who may be in need of service.

Staff: Program Director - .01 FTE

Specific areas of agency's district canvassed door to door.

Staff: Counselor - .05 FTE

Counselor - .05 FTE

Counselor - .05 FTE

Appropriate reports completed on canvassing efforts

Staff: Counselor - .01 FTE

Counselor - .01 FTE

Counselor - .01 FTE

Compile monthly agency and contract outreach reports and special reports as needed.

Staff: Program Director - .01 FTE

Monitor outreach services to insure contract compliance and quality of service.

Staff: Program Director - .01 FTE

Provide clerical support in the areas of recordkeeping, typing, xeroxing and maintenance of supplies.

Staff: Secretary - .03 FTE

JECTIVE

PERFORMANCE INDICATORS

PROGRAM ELEMENTS/STAFFING PATTERNS

6. (con.) To increase the access to and utilization of appropriate services by homebound, isolated and/or at risk elderly through the provision of 72 units of outreach services during the period July 1, 1981 - June 30, 1982.

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

Maintain clean and sanitary office area.

Staff: Janitor - .03 FTE

Provide on-going staff support to a district advisory committee whose responsibilities include participation in on-going long term comprehensive planning activities.

Staff: Program Director - .01 FTE

Secretary - .005 FTE

Consult with PACT Administrative staff on senior center.

Staff: Program Director - .0045 FTE

Executive Director - .0015 FTE

Submit required fiscal reports and invoices in the proper forms and manner.

Staff: Accountant -.0021 FTE

Accounting Clerk -- .0075 FTE

Develop and maintain fundraising programs.

Staff: Program Director - .1 FTE