

EXHIBIT B

Recipient of PHB Funds Contract No. [SAP Contract Number]
[Subject of Contract]

This contract is made this 1st date of July, 2024 (the Effective Date) between the City of Portland, a municipal corporation of the State of Oregon, acting by and through its Portland Housing Bureau (PHB) (the "City"), and [agency name], “(the “Recipient”)(each individual a “Party” and collectively “the Parties” for the provision of [services to be provided] (the “Contract”). The City is authorized to enter into this contract by Ordinance [Ordinance no.].

1. Effective Date and Duration

Recipient is eligible to receive disbursements under this Contract beginning on the Effective Date and ending on [DATE]. This Contract will remain in effect during any period the Recipient has control of funds or program income provided under this Contract, and during any period of affordability required by a project funded under this Contract. [If Multi-Year] The initial term of this agreement shall last no longer than five (5) years and may be renewed by the Parties for an additional five (5) years through execution of a written Agreement.

2. Contract Manager

The Parties hereby designate the following individual as their Contract Manager for the purposes of this Agreement. All reports, notices, and other communications required under or relating to this Contract must be directed to the appropriate individual identified below. The City’s Contract Manager is authorized to approve work and billings hereunder, to give notices referred to herein, to terminate the Contract as provided herein, and to approve all changes except those that increase the total Contract amount. The Parties may change their Contract Manager through written notice to the other party.

<u>PHB</u>	<u>Recipient</u>
Contract Manager: [Name]	Contract Manager: [Name]
421 SW Sixth Avenue, Suite 500	[Street address or PO box]
Portland, OR 97204	[City, State, Zip]
(503) 823-[Extension]	[Phone number]
(503) 823-2387 (fax)	
[first.last]@portlandoregon.gov	[email address]
	EEO Confirmed [Check on Buyspeed]
	Business License No. [Recipient must provide number and screen shot showing they are current]

3. Scope of Services

The statement of work is contained in Exhibit A.

4. Source of Funds and Compensation

The total compensation under this Contract will not exceed \$[Amount] in [Funding Source(s) e.g., General Funds]. The funding [does/ does not] include federal funds, thus the Recipient of the funds [is / is not] a Subrecipient of federal funds and thereby subject to all requirements for Subrecipients as outlined in 2 CFR 200.332. The compensation requirements are detailed below. Recipient must submit a final invoice and all other documents required by this Contract to PHB by [date in early July per F&A guidance].

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- A. The City shall reimburse the Recipient for actual expenditures in accordance with the budget (Exhibit D) after Recipient submits an Invoice Form (Exhibit E), a detailed ledger with reconciliation of accruals, and copies of all receipts and other documentation requested by the City's Contract Manager.
- B. Net payment terms are set at [# days, City default is 30] for this Contract.
- C. Any changes to the approved budget must be authorized in writing by the City Contract Manager before any expenditure of funds in new amounts or line items.
- D. Total compensation under this Contract will not exceed [written out dollar amount, # in parentheses].

5. Reporting

Reporting requirements are contained in Exhibit B. Equity reporting requirements are contained in Exhibit D. The final and quarterly report format is contained in Exhibit G. The **final report is due [Date in July per Contract Manager preference]**.

6. Performance Measures

Expected performance measures, including outputs, outcomes and reporting requirements, are contained in Exhibit B.

7. List of Exhibits

The following Exhibits (collectively the "Exhibits") are attached hereto and incorporated by reference into this Contract:

Document	Description	No. of Pages
Exhibit A	Statement of Work	[#]
Exhibit B	Performance Outputs and Outcomes	[#]
Exhibit C	Terms and Conditions	[#]
Exhibit D	[Program] – Budget	[#]
Exhibit E	[Program] – Invoice	[#]
Exhibit F	Quarterly and Final Project Report Form	[#]
[Exhibit G]	Federally Required Info [if funding source is federal]	[#]
[Exhibit H, I, ...]	[List other exhibits as required by program]	[#]

Recipient agrees to comply with and perform all work in accordance with all conditions, obligations, requirements, standards, policies, and deliverables identified in the Exhibits.

8. Counterparts

This Contract may be executed in two (2) or more counterparts or on separate signature pages, each of which will be deemed an original. All counterparts shall constitute one and the same instrument and all separate signature pages will become part of the integrated Agreement. This Agreement shall be binding when each of the Parties has executed one or more counterparts, including by electronic signature, and has delivered the executed counterpart to the other Party. For purposes of such delivery, a telecopy, email, or electronic-format document showing execution shall be sufficient.

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IN WITNESS WHEREOF, the parties have executed this Contract as of the Effective Date.

Recipient

Authorized Signature Date

Printed Name and Title

Address: _____

Phone: _____

Prepared by Anna Shook, Contract Administrator, Portland Housing Bureau

Sent to Recipient via email at email address here

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Contract Number: insert number

Contract Title: Insert Subject of Contract language from front page

CITY OF PORTLAND SIGNATURES

By: _____ Date: _____
Bureau Director

By: N/A _____ Date: _____
Elected Official

Approved:

By: N/A _____ Date: _____
Office of City Auditor

Approved as to Form:

By: _____ Date: _____
Office of City Attorney

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Exhibit A. Statement of Work

The Subrecipient/Grantee will provide the following services in conjunction with [name(s) of program(s)].

A. [Activity title]:

1. [phrase starting with action verb, including]:
 - a. [list detailed actions, all beginning with action verbs]

B. [Activity title]:

2. [phrase starting with action verb, including]:
 - b. [list detailed actions, all beginning with action verbs]

(Insert as many activities as appropriate)

[If necessary, list special conditions the activities need to take into account that are not in the normal terms and conditions – e.g., preference policy or other intake mechanisms]

EXHIBIT B

Exhibit B – Performance Measures and Required Reporting

I. Performance Measures

A. Output:

[Insert outputs, e.g., complete classroom training for 60 households; complete minor rehabilitation services for 59 homeowners in the City of Portland; respond to 100 hotline callers, etc].

1. [insert specific details for given outputs e.g., geographic location of home repairs]

B. Outcomes:

[insert desired outcomes e.g., 80% of clients will still be in homes 12 months after services are provided].

II. Required Reporting

A. Quarterly and Final Project Reports – The Recipient will prepare quarterly reports summarizing the program outputs and outcomes achieved to date using the form provided in this contract (Exhibit G). Quarterly reports are due 30 days after the end of the quarter except for the final quarter. (Reports are due October 30, 2019, January 30, 2019, April 30, 2020 and [Date in July as per page 1].) As necessary, the City Contract Manager may require small changes in the report, or additional reports within reason.

B. Client Data Tracking – The Recipient will enter information on all client services and demographic information for all participant households in the City of Portland in the on-line database system Community Services (AKA ServicePoint), due at the same time as the quarterly reports. PHB will provide, free of charge, access, training and support for use of Community Services. Payment for invoices may be withheld until this information is entered into Community Services if it is not available by the time Quarterly and Final Project Reports are due.

Recipient will submit the following program reports:

- Quarterly and Year-End report form (Exhibit G)
- [If applicable: Community Services: PHB – Participant Demographics Report]

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Exhibit C Terms and Conditions

General Contract Provisions

1. The following general terms and conditions (the “Terms and Conditions”) apply to all Portland Housing Bureau’s (“PHB’s”) grant agreements or, if Federally funded, subrecipient contracts for awards of PHB funds (the “Contract”). The term “Recipient” refers to the agency receiving awarded PHB funds, originating from either local or Federal sources. If funding includes Federal sources, Recipient is also considered a Subrecipient per the definition listed in 2 CFR 200.331 and is subject to all Subrecipient requirements in 2 CFR 200.332. In the event that the Contract contains a provision that conflicts with a provision of the Terms and Conditions, the more restrictive provision will apply.

REPRESENTATIONS AND WARRANTIES

2. Recipient represents and warrants to PHB as follows:
 - A. **Authority.** Recipient has full power, authority, and legal right to execute and deliver the Contract and to incur and perform its obligations hereunder. The execution and performance by Recipient of the Contract has been duly authorized by all necessary action of Recipient.
 - B. **No Violations or Default.** No event has occurred, and no condition exists with respect to Recipient that constitutes an Event of Default. Each of the following is an “Event of Default”:
 - i. **Breach.** If Recipient breaches a material provision of the Contract, whether by action or inaction, and such breach continues and is not remedied within thirty (30) days after Recipient receives written notice from PHB specifying the breach;
 - ii. **Assignment.** If Recipient makes an assignment for the benefit of creditors, or is adjudicated a bankrupt, or has a receiver, trustee or creditor’s committee appointed over it that is not removed within one hundred eighty (180) days after appointment;
 - iii. **Failure to Disclose; Misrepresentation.** Recipient fails to disclose any material fact related to the Contract or upon discovery by PHB of any misrepresentations by, on behalf of, or for the benefit of, Recipient; or
 - iv. **Misuse of Funds.** Recipient uses any portion of the funds in a manner inconsistent with the Contract.
 - C. **Litigation.** No action, suit or proceeding is pending against Recipient before any court or administrative agency, that purports to affect the legality, enforceability, or validity of the Contract; and
 - D. **Compliance with Laws.** Recipient is in material compliance with all federal, state, and local laws, and all rules, regulations, ordinances, and orders applicable to it. Any violation of such laws, rules, regulations, ordinances, or orders shall constitute an Event of Default by Recipient.

AFFIRMATIVE COVENANTS

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3. Recipient covenants and agrees to the terms listed below. Recipient shall include the terms listed in Section 3 of this Agreement in all subcontracts, to the benefit of PHB.

A. **Performance of the Work.** Recipient shall perform the work in an expeditious and continuous manner in compliance with all federal, state, and local laws, and all rules, regulations, ordinances, and orders pertaining to or regulating the activities performed pursuant to the Contract, including those hereinafter adopted, including, but not limited to, the following:

i. If Recipient is a 501(c)(3) organization, Recipient shall maintain its nonprofit and tax-exempt status during this Agreement. Recipient must be EEO certified by the City in order to be eligible to receive funds;

ii. **[Use if Federal Funds]** DRUG-FREE WORKPLACE ACT OF 1998. Recipient shall maintain a drug-free workplace in accordance with the requirements of the Drug-Free Workplace Act of 1998 and in accordance with requirements of 2 CFR part 182;

iii. **[Use if Federal Funds]** Contract Administration (24 CFR 570.502(b)). Recipient shall comply with the applicable provisions of the Code of Federal Regulations, 2 CFR 200 as describes contract administration (2 CFR Subparts A, B, and C), administrative processes (2 FR 200 Subpart D), and cost principles (2 CFR Subpart E). Recipient shall comply with audit principles outlined in 2 CFR 200 Subpart F];

iv. **[Use if Federal Funds]** [Recipient shall comply with the provisions of 2 CFR 200.332(c) and (d), which require that a written Code of Standards of Conduct be maintained by the Recipient, as it relates to the performance of employees engaged in the award and administration of contracts.]

B. **Changes in Anticipated Services.** If, for any reason, Recipient's anticipated services or actions are terminated, discontinued, or interrupted, PHB's may terminate, suspend, or reduce its payments under this Contract. Recipient shall immediately refund to PHB any unexpended funds received by Recipient.

C. **Non-Discrimination; Civil Rights.** During the term of the Contract, Recipient shall comply with the following:

i. The non-discrimination provisions of Title VI of the Civil Rights Act of 1964 (24 CFR 1), the Fair Housing Act (24 CFR 100), and Executive Order 11063 (24 CFR 107);

ii. Prohibitions against discrimination on the basis of age under Section 109 of the Act as well as the Age Discrimination Act of 1975 (24 CFR 146), and the prohibitions against discrimination against otherwise qualified individuals with handicaps under Section 109 as well as section 504 of the Rehabilitation Act of 1973 (24 CFR 8);

iii. The equal employment and affirmative action requirements of Executive Order 11246, as amended by Order 12086 (41 CFR 60);

iv. The equal employment and non-discrimination requirements of Portland City Code Sections 3.100.005 (City Policies Relating to Equal Employment Opportunity, Affirmative Action and Civil Rights), 3.100.042 (Certification of Contractors), and Chapter 23 – Civil Rights;

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- v. The Americans with Disabilities Act (42 USC 12131, 47 USC 155, 201, 218 and 225), which provides comprehensive civil rights to individuals with disabilities in the areas of employment, public accommodation, state and local government services and telecommunications. The Act also requires the removal of architectural and communication barriers that are structural in nature in existing facilities.

- vi. **Non-discrimination.** Recipient, with regard to the work performed by it during the Contract, shall not discriminate on the grounds of race, color, national origin, sex, sexual orientation, age, religion, disability, marital status, or family relationships in the selection and retention of Recipients, including procurements of materials and leases of equipment. Recipient shall not participate either directly or indirectly in the discrimination prohibited by section 21.5 of the Regulations, including employment practices for a program set forth in Appendix B of the Regulations.

- vii. **[USE FOR CDBG and/or HOME FUNDS]** As a recipient of CDBG and/or Home funds, Recipient will also comply with affirmative marketing policy and outreach to minorities and women and to entities owned by minorities and women in accordance with 24 CFR 92.351 and/or 24 CFR 570.601(a)(2), if the funds will be used for housing containing five (5) or more assisted units.

- D. **Solicitations for Subcontractor, Including Procurements of Materials and Equipment.** In all solicitations either by competitive bidding or negotiation made by Recipient for work to be performed under a subcontract, including procurements of materials or leases of equipment, each potential Subcontractor or supplier shall be notified by Recipient of Recipient's obligations under the Contract and the Regulations relative to non-discrimination on the grounds of race, color, national origin, sex, sexual orientation, age, religion, disability, marital status, or family relationships.

- E. **Information and Reports.** Recipient shall provide all information and reports required, and shall permit access to its books, records, accounts, other sources of information, and its facilities as may be determined by PHB or any state or federal agency to be pertinent to ascertain compliance with orders and instructions. Where any information required of a Recipient is in the exclusive possession of another who fails or refuses to furnish this information, Recipient shall so certify to PHB or any state or federal agency as appropriate, and shall set forth what efforts it has made to obtain the information.

- F. **Records and Inspection.** Recipient shall keep proper books of account and records on all activities associated with the Contract (collectively, the "Records"). Recipient shall maintain the Records in accordance with generally accepted accounting principles and shall retain the Records for five (5) years after PHB makes final payments and all other pending matters are closed. Recipient shall permit PHB, **[USE IF FEDERAL FUNDS HUD, the Comptroller General of the United States, or any of their duly authorized representatives,]** to inspect, review and make excerpts and transcripts of the Records with respect to the receipt and disbursement of funds received hereunder. The authorized representatives will have access to the Records at any reasonable time for as long as the Records are maintained. This Section will survive the expiration of the term and any termination of the Contract and upon such termination Recipient shall promptly transfer all Records to PHB.

- G. **Audits.** PHB, **[USE IF FEDERAL FUNDS HUD, the Comptroller General of the United States, or any of their duly authorized representatives,]** may at any time during normal business hours, as

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often as deemed necessary, to audit, examine, and make excerpts or transcripts of all relevant data. Any deficiencies noted in audit reports must be fully cleared by Recipient within thirty (30) days after receipt by Recipient. Failure of Recipient to comply with the above audit requirements will constitute a violation of the Contract and may result in the withholding of future payments. Recipient hereby agrees to have an annual agency audit conducted in accordance with City policy and if federal funds are awarded, in accordance with the provisions of 2 CFR 200, Subpart F.

- H. **Political Activity.** Recipient shall not permit any of the funds, materials, property, or services provided under the Contract to be used for any partisan political activity, or to further the election or defeat of any candidate for public office, or to influence or attempt to influence legislation pending before the United States Congress, the State of Oregon, the County of Multnomah or the City of Portland.
- I. **City Recognition.** Recipient shall insure recognition of the role of PHB in providing services through the Contract. All activities, facilities, and items utilized pursuant to the Contract shall be prominently labeled as to funding source. In addition, Recipient will include a reference to the support provided herein in all publications about activities made possible with funding provided under the Contract.
- J. **Indemnification.** Recipient shall hold harmless, defend, and indemnify PHB, the City of Portland, and its officers, agents and employees against all claims, demands, actions, and suits (including all costs) brought against any of them arising from actions or omissions of Recipient and/or its contractors in the performance of the Contract. This duty shall survive the expiration or termination of the Contract.
- K. **Insurance.** Recipient shall obtain and maintain in full force at its expense, throughout the term of the Contract and any extension periods, the required insurance identified below. PHB reserves the right to require additional insurance coverage as may be required by statutory changes during the term.
- a. **Workers' Compensation Insurance:** Recipient, its contractors and all employers working under the Contract shall comply with ORS Chapter 656 and as it may be amended from time to time. Unless exempt under ORS Chapter 656, Recipient, its contractors, and any employers working under the Contract shall maintain coverage for all subject workers.
 - b. **Commercial General Liability Insurance:** Recipient shall have commercial general liability insurance covering bodily injury, personal injury, property damage, including coverage for independent contractor's protection (required if any work will be subcontracted), premises/operations, contractual liability, products and completed operations, in a per occurrence limit of not less than \$1,000,000, and aggregate limit of not less than \$2,000,000.
 - c. **Automobile Liability Insurance:** Recipient shall have automobile liability insurance with coverage of not less than \$1,000,000 each accident. The insurance must include coverage for any automobile, or all owned, scheduled, hired and non-owned automobile. This coverage may be combined with the commercial general liability insurance policy.
 - d. **Additional Insured:** The liability insurance coverages, except Professional Liability, Errors and Omissions, or Workers' Compensation where applicable, must be without prejudice to coverage otherwise existing, and must name the

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City of Portland and its bureaus/ divisions, officers, agents, and employees as Additional Insureds, with respect to the Subrecipient's or its contractor's activities to be performed or services to be provided. Coverage must be primary and non-contributory with any other insurance and self-insurance. Notwithstanding the naming of additional insureds, the insurance must protect each additional insured in the same manner as though a separate policy had been issued to each, but nothing herein will operate to increase the insurer's liability as set forth elsewhere in the policy beyond the amount or amounts for which the insurer would have been liable if only one person or interest had been named as insured.

- e. **Continuous Coverage:** Notice of Cancellation: Recipient shall maintain continuous, uninterrupted coverage for the duration of the Contract. There must be no termination, cancellation, material change, potential exhaustion of aggregate limits or nonrenewal of coverage without thirty (30) days written notice from Recipient to PHB. If the insurance is canceled or terminated prior to termination of the Contract, Recipient shall immediately notify PHB and provide a new policy with the same terms. Any failure to comply with this clause will constitute a material breach of the Contract and will be grounds for immediate termination of the Contract.

RIGHTS AND REMEDIES UPON EVENT OF DEFAULT; TERMINATION

- 4. **Rights and Remedies.** Upon the occurrence of an Event of Default and at any time thereafter, PHB may, at its option, exercise any one or more of the following rights and remedies:
 - A. **Termination for Cause.** Upon the occurrence of an Event of Default and at any time thereafter, PHB may terminate the Contract for cause.
 - B. **Enforcement.** In the event that the Contract is terminated for cause, PHB may take one or more of the following actions:
 - i. **Repayment.** PHB may declare any funds disbursed to Recipient, to be immediately due and payable in full. To the extent that the Event of Default is in connection with the misuse of funds, PHB may declare any misused funds and to be immediately due and payable in full and, upon such declaration, Recipient shall pay to PHB the amount declared to be immediately due and payable. In addition, Recipient must provide all finished or unfinished documents, data, studies, and reports prepared by Recipient;
 - ii. **Termination of Funding Obligation.** PHB may terminate PHB's obligation to disburse additional funds to Recipient; and
 - iii. **Other Legal Remedies.** PHB may exercise any other right or remedy available at law, in equity, or otherwise in such order and manner as it may select.
 - C. **Completion of the Work.** In addition, if the Contract is terminated for cause, PHB may complete the work either itself or by agreement with another recipient, or by a combination thereof. In the event the cost of completing the work exceeds the amount actually paid to Recipient hereunder plus the remaining unpaid balance of the compensation provided herein, then Recipient shall pay to PHB the amount of excess. **IF FEDERAL FUNDS Allowable costs will be determined in accordance with 2 CFR Subpart E.**

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- D. **Termination for Convenience.** PHB and Recipient may terminate this Agreement at any time by mutual written agreement. [Use if no Federal Funds: Alternatively, PHB may, upon thirty (30) days written notice, terminate this agreement for any reason deemed appropriate in its sole discretion. If the Agreement is terminated as provided in this paragraph, Recipient shall return any funds that would have been used to provide services after the effective date of termination. Unless the Parties agree otherwise, Recipient shall finish any work and services covered by any grant funds already paid and shall not commence any new work or services which would require payment from any unused grant funds.]

[Use if federal funds: PHB may, in accordance with 24 CFR 85.44, terminate the Contract for convenience].

MISCELLANEOUS

5. **Subcontracting.** If Recipient utilizes contractors to complete its work under the Contract, in whole or in part, Recipient shall require any of its contractors to agree, as to the portion contracted, to fulfill all obligations of the Contract as specified herein. However, Recipient shall remain obligated for full performance hereunder, and PHB shall incur no obligation other than its obligations to Recipient hereunder.
6. **Independent Contractor Status.** Recipient, and its contractors and employees are not employees of the City and are not eligible for any benefits through the City, including without limitation, federal social security, health benefits, workers' compensation, unemployment compensation, and retirement benefits.
7. **Conflict of Interest.** No City officer or employee, during his or her tenure or for two (2) years thereafter, shall have any interest, direct or indirect, in the Contract or the proceeds thereof. Any City officer or employee that selected Recipient, participated in the award of the Contract or managed the Contract shall not seek the promise of employment from Subrecipient or be employed by Recipient during the term of the Contract, unless a written waiver is obtained from the City.
8. **Amendment/Changes.** PHB or Recipient may, from time to time, request changes in writing in the scope of services or terms and conditions hereunder. Such changes, including any increase or decrease in the amount of Recipient's compensation, shall be incorporated in written amendments to the Contract. The Bureau Director is authorized to approve funding amendments up to 25% of the original budget amount of any contract covered under the ordinance.
9. **Copyright.** If the Contract results in any copyrightable material or inventions, PHB reserves the right to a royalty-free, non-exclusive and irrevocable license to reproduce, publish or otherwise use, and to authorize others to use, the work or materials for governmental purposes.
10. **Modification; Prior Agreements; Headings.** The Contract may not be modified or amended except by an instrument in writing signed by the parties. The Contract reflects and sets forth the entire agreement and understanding of the parties with respect to the subject matter hereof, and supersedes all prior agreements and understandings relating to such subject matter. The headings in the Contract are for the purpose of reference only and will not limit or otherwise affect any of the terms hereof.
11. **Successors and Assigns.** Recipient may not assign the Contract, in whole or in part, without the

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prior written consent of PHB. The Contract is binding upon and will inure to the benefit of the parties and their respective permitted successors and assigns.

12. **Governing Law, Jurisdiction, Venue.** The Contract shall be governed by and construed in accordance with the laws of the State of Oregon, without regard to its conflicts of law principles. Any legal action regarding the Contract must be brought and conducted in the federal or state court, as appropriate, serving Multnomah County, Oregon, and the parties hereby consent to the jurisdiction and venue of such courts.
13. **Validity; Severability.** If any provision of the Contract is held to be invalid, such event shall not affect, in any respect whatsoever, the validity of the remainder of the Contract, and the remainder shall be construed without the invalid provision so as to carry out the intent of the parties to the extent possible without the invalid provision.
14. **Third Party Beneficiaries.** There are no third-party beneficiaries to this Agreement, and the Agreement may only be enforced by the parties.
15. **[Use if CDBG or HOME Funds Awarded: If Recipient provides CDBG or HOME funds to for-profit owners or developers, non-profit owners or developers, subrecipients, homeowners, homebuyers, tenants receiving tenant-based rental assistance or contractors, Subrecipient must have a written agreement that meets the requirements of 24 CFR 570.503(b) or 92.504(c), respectively.]**

[Insert other terms and conditions per grant funding source]

EXHIBIT D
[NAME] PROGRAM BUDGET

[ADD COLUMNS FOR MULTIPLE FUNDING SOURCES]

Budget Category	PHB Award	Total Program Budget
Personnel		
Salaries		
Benefits & Payroll Taxes		
Total Personnel		
Operating Expenses		
Equipment Expenditures		
Rentals		
Computer Technology		
Mileage & Parking		
Consultants		
Subcontractors		
Miscellaneous Meeting Expenses		
Professional Services		
Other: [Specify]		
Total Operating Expenses		
Administrative Expenses (directly or indirectly billed)		
Salaries		
Benefits & Payroll Taxes		
Office / Facility Rent		
Utilities		
Office Supplies		
Travel & Training		
Audit Services		
Insurance		
Indirect Rate Billing (\$)		
Total Administrative Expenses		
Direct Client Assistance		
Specify: [Specify type of expenses expected]		
Total Client Assistance		
TOTAL BUDGET		

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TABLE 2: STAFFING DESCRIPTIONS AND AMOUNTS

Position Title and /or Description	Hourly Salary Rate	PHB Requested FTE	PHB Requested Dollar Amount
[Position title]	[\$/hr]	[% of FTE]	[Amount]
[add lines as necessary]			
TOTAL			

TABLE 3: OTHER FUNDING SOURCES

Funding Sources	Status of Funding	Amount
[Names of sources]	[Pending, Committed, Received, Etc.]	
[Add lines as necessary]		

EXHIBIT E

[Recipient Name] [FY /) [Program Name]

Invoice

Request for Payment #: _____ Contract #: [Contract No.] Billing Period: _____

[Funding Source]

CATEGORY	BUDGET	AMOUNT THIS INVOICE	BILLED YTD	BALANCE
Personnel				
Operating				
Direct Client Assistance				
Admin Direct Costs				
Indirect Costs				
TOTAL				

By signing this report, I certify to the best of my knowledge and belief that the report is true, complete, and accurate, and the expenditures, disbursements and cash receipts are for the purposes and objectives set forth in the terms and conditions of the Federal award. I am aware that any false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to criminal, civil or administrative penalties for fraud, false statements, false claims or otherwise. (U.S. Code Title 18, Section 1001 and Title 31, Sections 3729-3730 and 3801-3812).

NOTE: This form must be recreated on the agency's letterhead that includes contact information or the invoice will not be valid.

Preparer's name and title: _____ Date: _____

Signature

Email: _____

Authorizing Signature: _____ Date: _____

EXHIBIT F
Quarterly and Final Project Report

Date Submitted:	
Recipient Name:	
Contract Number:	
Program Title:	
Prepared by:	
	<input type="checkbox"/> 1 st Quarter: July 1 to September 30
	<input type="checkbox"/> 2 nd Quarter: October 1 to December 30
	<input type="checkbox"/> 3 rd Quarter: January 1 to March 31
	<input type="checkbox"/> 4 th Quarter: April 1 to June 30

Progress towards Outputs and Outcomes

OUTPUTS	1 st Quarter	2 nd Quarter	3 rd Quarter	4 th Quarter	Total (Year to Date)	Annual Goal
[List outputs here]						
						100%

As a part of this report provide a *brief* written response to the following questions **including accomplishments and challenges related to racial disparities or disparities for other underserved groups**:

1. **ACCOMPLISHMENTS:** Describe the overall accomplishments and successes achieved through the Contract.

2. **CHALLENGES:** Describe any challenges, including any project activities or outputs that are behind schedule or are not being carried out, and how you dealt with them.

3. **NEW DIRECTIONS.** Describe any activities or approaches taken that deviate from or add to the scope of the project.

4. **ADDITIONAL COMMENTS or FEEDBACK** on the contracts:

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Additional Questions for the Final Report Only. Reports are due according to the schedule listed in Section IV Required Reporting. Submit report to [Contract Manager] via email: [Email Address].

1. **GAPS:** Describe your analysis of participant demographics including race. Are there any disparities in access or outcomes? Do clients served report experiencing problems because of limitations of the program, or because of a lack of other services?
2. **TRENDS:** Describe trends in the work and the clients served.
3. **SUGGESTED CHANGES:** What changes would you recommend for the program and/or the contract? How do you plan to address any disparities in access or outcomes for your programs?

**PARTICIPANT DEMOGRAPHICS REPORT
BENEFICIARY DATA (RECIPIENT NAME)**

Reporting Period From: July 1, 2024 (year) To: June 30, 2025 (year)

Complete a copy of this report for each of the different programs/projects funded under this contract.

Choose one of the following categories: individuals or households, and enter all info based on that category. The #'s below are based on:

Individuals or **Heads of Households** (*the Head of Household is the person in the household with the largest income*). Please make sure that totals of each category below match.

Total Number of Individuals or Households: _____

1. Gender

Gender	Total This Quarter	Total Year-To-Date
Male		
Female		
Other/Non-Binary		
Total		

2. Race or Origin

Purpose and Instructions: This section reports data on the race or origin of your clients. To ensure that accuracy exists and to ensure that no one needs to enter the identity of “other” we ask that you define identity as specifically as you can. We do not include a “multiracial” category and instead ask that individuals of more than one race be included in each of the races specified. This will cause the race in combination categories to sum to more than the population count.

2a. Race and Origin (PHB) –

Race (Required) FY 18-19	Total This Quarter	Total Year-To-Date
African		
Asian		
Black/African American		
Latino/Hispanic		
Middle Eastern		
Native American/Alaskan Native		
Native Hawaiian		
Pacific Islander		
Slavic		
White		
Declined to answer		
Total		

EXHIBIT B

BENEFICIARY DATA (RECIPIENT NAME)

2b. Race and Origin (HUD)

Purpose and Instructions: This section reports data on the race and ethnicity of your clients to the Department of Housing and Urban Development (HUD). The HUD database requires that clients be singly identified in the categories below.

Race (Required)	Non-Hispanic This Qtr.	Non-Hispanic Y-T-D	Hispanic This Qtr.	Hispanic Y-T-D	Total This Qtr.	Total Y-T-D
White						
Black/African American						
Asian						
American Indian/Alaskan Native						
Native Hawaiian and Other Pacific Islander						
American Indian/Alaskan Native & White						
Asian & White						
Black/African American & White						
American Indian/Alaskan Native & African American/Black						
Other						
Total*						

*Total should add up to the total people or households served

EXHIBIT F-1
(Page 3 of 3)
BENEFICIARY DATA

3. Income

Income (Required)	Total This Quarter	Total Year-To-Date
Over 80% of MFI		
(Moderate Income) 51-80% of MFI		
(Low) 31%-50% of MFI		
(Extremely Low) 0%-30% of MFI		
<i>Total Low/Moderate Income</i>		
Total*		

*Total should add up to the total people served

4. Geographic Location, if applicable

Residence (quadrant or zip code)	Total This Quarter	Total Year-To-Date
NE Portland		
SE Portland		
NW Portland		
SW Portland		
N Portland		
Other		
Total		

5. Other

Other	Total This Quarter	Total Year-To-Date
Female Head of Household (Required)		
Elderly Head of Household (Over 65)		
Disabled/Special Needs		

EXHIBIT B

**Exhibit F-2
RECIPIENT ANNUAL EQUITY REPORT**

PHB works to eliminate housing barriers of all kinds. We recognize the ongoing impacts of Oregon’s history of housing discrimination and social injustice and the need to address current-day disparities in access to resources, programs, and opportunities. In Portland, people of color experience racism and encounter barriers to stable housing and housing resources at much higher rates than their white counterparts. This leads to disparities in living conditions and less access to public goods, services, and resources. It is critical that PHB examine our work and our outcomes, including through our funding of community programs. Please assist us by completing this report.

Name of Organization: _____

Name of Program: _____

Program Manager: _____

Program Manager Phone: _____

Program Manager Email: _____

PHB Contract Manager: _____

Sections I-IV ask you to report on your entire organization.

I. ORGANIZATIONAL COMMITMENT

Mission Statement:

EXHIBIT B

Values and/or DEI statement (if your organization has one):

II. LEADERSHIP AND MANAGEMENT

Board of Directors: Please select one category for each Board member. If two or more races, select “multiracial.”

Race/Ethnicity	Number of Board Members
Asian	
Black/African American	
Latinx/Hispanic	
Middle Eastern	
Native American/Alaskan Native	
Native Hawaiian/Pacific Islander	
Slavic	
White	
Multiracial	
Decline to Answer	
Total (unduplicated #)	

Leadership/Management: Please select one category for each person. If two or more races, select “multiracial.”

Race/Ethnicity	Number of Leadership/Management
Asian	
Black/African American	
Latinx/Hispanic	
Middle Eastern	
Native American/Alaskan Native	
Native Hawaiian/Pacific Islander	
Slavic	
White	
Multiracial	
Decline to Answer	
Total (unduplicated #)	

Median Salary of *Leadership/Management* : _____

EXHIBIT B

III. WORKFORCE

Staff (non-managerial): Please select one category for each person. If two or more races, select “multiracial.”

Race/Ethnicity	Number of Staff (non-managerial)
Asian	
Black/African American	
Latinx/Hispanic	
Middle Eastern	
Native American/Alaskan Native	
Native Hawaiian/Pacific Islander	
Slavic	
White	
Multiracial	
Decline to Answer	
Total (unduplicated #)	

Median Salary of Staff (non-managerial): _____

EXHIBIT B

Section IV asks about your organization. Please identify a combined total of 3 outcomes from Section IV and Section V.

IV. ORGANIZATION: OUTCOMES

- Last fiscal year (2023-2024) your organization identified up to 2 (minimum of 1) workforce/organization centered outcomes. Please list this outcome(s) below:
- Last fiscal year (2023-2024) your organization identified a data source to to measure your proposed outcome(s), please list this below:
- **For your annual report, due at the end of fiscal year (2024-2025), please attach a reporting of your outcome(s) using the data source your proposed.** The report should cover the period from July 1, 2024- June 30, 2025. There is no set reporting structure at this time: raw numbers, a chart or graph are all acceptable. Please use Adobe or Microsoft Office products when reporting.

Sections V and VI ask about the PHB funded program you are contracted to deliver.

V. PROGRAM: DATA

Please provide the following information. Feel free to submit responses by answering all prompts below or providing a graphic (i.e. pie chart, line graph, etc.)

Please include program data for the following:

- Total intakes
- Total clients served
- Percentage of clients served based on zip codes (include all zip codes served; at time of intake)
- Race & Ethnicity of clients served
- Age of clients served (at time of intake)
- Number of languages served in the past year (list all):

EXHIBIT B

VI. PROGRAM: OUTCOMES

- Last fiscal year (2023-2024) your organization identified up to 2 (minimum of 1) client-centered *Outcomes* that advances racial equity in your program. Please list this below:
- Last fiscal year (2023-2024) your organization identified a data source to measure your outcome(s). Please list this below:
- **For your annual report, due at the end of fiscal year (2024-2025), please attach a reporting of your outcome(s) using the data source you proposed.** The report should cover the period from July 1, 2024- June 30, 2025. There is no set reporting structure at this time: raw numbers, a chart or graph are all acceptable. Please use Adobe or Microsoft Office products when reporting

Community Highlight(s)

Please share a story and/or testimonial from community members that have been helped through this PHB funded program. Be sure to include all staff and/or volunteers that were involved in this experience.

The Portland Housing Bureau may share this as part of our external communications about the programs we fund. If the client would prefer to omit their name or use aliases, please do so. If available, please include a photo.

[blank space for testimonial]

Reporting

Please submit all materials with your annual report.

****Expectations once Year 2 reporting is submitted:**

Year 3 2025-2026

Last year you collected baseline data on your racial equity outcomes, what does the data show you? How will you use this data to advance equity in your program or workplace?

Year 4 2026-2027

Last year you collected data on your racial equity outcomes. How does it compare to the previous year? Do you need to refine your outcome or your data tool?

EXHIBIT B

Only Use this Exhibit if Contract is Federally Funded

Exhibit G – Federally Required Information for Grant-Funded Contracts
Subrecipient Contract Click here to enter contract number
Federally Required Contract Information

Name of Subrecipient: *This should match the official name in the DUNS system. DUNS number registration info can be found at <http://www.dnb.com/get-a-duns-number.html>*

SAM Unique ID Number: DUNS Number

Federal Award Program Name: --Choose From List--

If Other Explain: Detail Federal Award Program Name if not included in the drop down list.

Grant Number for Award (FAIN): *Enter Federal grant number for the award*

Total Amount of Federal Award: Enter Amount in Dollars

Amount of Federal Funds Obligated in the Contract: Click here to enter text

Federal Award Execution Date: Click here to enter a date.

Contract Period From: Click here to enter a date

To: Click here to enter a date

Program Name: Enter program name

HUD Pass-through Entity: City of Portland

Awarding Official Contact Information

Name: Leslie Goodlow Phone: 503-823-4160 Email: leslie.goodlow@portlandoregon.gov

CFDA Number/Name: Choose an item.

Is the funding for Research and Development (R & D)? *No*

Indirect Cost Rate (*If applicable*): Indirect cost rate or N/A if not applicable