



**AMENDMENT No. 1 to
Contract No. 3 2 0 0 3 4 8 2
FOR
Eviction Legal Defense Financial Assistance Program**

This Amendment No. 1 amends Contract No. 32003482 dated the 1st day of July, 2024, by and between United Way of the Columbia Willamette, Contractor a Nonprofit Organization of the State of Oregon, and the City of Portland, a municipal corporation of the State of Oregon ("City"), by and through their duly authorized representatives. This Amendment may refer to Contractor and City individually as a "Party" or collectively as the "Parties."

This Amendment is authorized by Ordinance 191798.

The Effective Date of this Amendment is 10/16/2024. The purpose of this Amendment is to **increase the program budget by a total of \$500,000, update the Scope of Work, and update the Financial Assistance Guidelines.**

The Parties agree to Amend the Contract as follows:

1. The Contract not-to-exceed amount of \$1,120,000 is increased by \$500,000 to a new total not-to-exceed amount of \$1,620,000. These funds are County dollars for the implementation of financial assistance for tenants in the Eviction Legal Defense Program. \$450,000 is allocated for financial assistance for tenants, and \$50,000 for United Way's indirect costs.
2. Exhibit A is replaced and updated per new Exhibit A, attached to and incorporated by reference.
3. The following language is added to the Contract. New language is in **BOLD**:

Exhibit A –

A. Intake and Screening for Financial Assistance

- b. United Way of the Columbia Willamette shall use the ELD Financial Assistance guidance and program forms (Exhibit G), along with any other form designed by United Way of the Columbia Willamette when screening ELD program participants for ELD Financial Assistance.

B. Administering Financial Assistance

- b. Residents of all of Multnomah County will be eligible for financial assistance from the County's pool of funds.**
- d. Documentation Requirements: **Multnomah County requires the use of the landlord verification process for County funds.**

4. Exhibit E is replaced and updated by amended Exhibit E, attached hereto and incorporated by reference.
5. Exhibit G is replaced and updated by amended Exhibit G, attached hereto and incorporated by reference.

All other terms and conditions of the Contract remain unchanged by this Amendment and in full force and effect.

This Amendment may be signed in two (2) or more counterparts, each of which shall be deemed an original, and which, when taken together, shall constitute one and the same instrument. The Parties agree that they may execute this Amendment by electronic means, including the use of electronic signatures.

Signatures on Following Pages

IN WITNESS WHEREOF, the Parties hereby cause this Amendment to be executed.

Contractor

Authorized Signature

Date

Kelly O'Lague, Executive Director

Printed Name and Title

Address: 619 SW 11th Ave #300

Portland, OR 97205

Phone: (503) 228-9131

Prepared by Breonne DeDecker, Manager, Rental Services Office, Portland Housing Bureau

Sent to Linda King via email at lindak@unitedway-pdx.org

Contract Number: 32003482

Amendment Number: 1

Contract Title: Eviction Legal Defense Financial Assistance Program

CITY OF PORTLAND SIGNATURES

By: _____ Date: _____
Bureau Director

By: _____ Date: _____
NA
Elected Official

Approved:

By: _____ Date: _____
NA
Office of City Auditor

Approved as to Form:

By: _____ Date: _____
Office of City Attorney

Attachment 1: Amended Statement of Work

Exhibit A. Statement of Work

Eviction Legal Defense Financial Assistance Program

The goal of the Eviction Legal Defense (ELD) program is to provide free legal representation to tenants facing eviction to mitigate the harms caused by evictions and increase housing stability for tenants. As part of the ELD program, financial assistance is available to resolve eviction and termination cases of program participants. Data indicates that BIPOC households are more at risk of eviction and its negative impacts, a targeted outreach will be undertaken inform BIPOC households of this program. The Subrecipient will provide the following services in conjunction with the ELD program.

A. Intake and Screening for Financial Assistance:

- a. United Way of Columbia Willamette shall accept direct referrals from ELD program providers, Portland Community College (PCC) and Multnomah Public Defenders (MPD), for ELD Financial Assistance. Direct referrals shall be tenants who are receiving legal representation through the PHB-funded ELD program and who need financial assistance to resolve their pending termination notice, pending loss of housing subsidy, or eviction court case.
- b. United Way of the Columbia Willamette shall use the ELD Financial Assistance guidance and program forms (Exhibit G), along with any other form designed by United Way of the Columbia Willamette when screening ELD program participants for ELD Financial Assistance.

B. Administering Financial Assistance:

- a. United Way of the Columbia Willamette shall distribute financial assistance in the most efficient way possible to allow for expeditious payment given the time sensitive nature of housing terminations and evictions.
- b. United Way of the Columbia Willamette ELD Financial Assistance shall be utilized to settle disputes and assist with relocation within the City of Portland
 - a. Exceptions to this rule will be allowed on a case-by-case basis, with United Way of the Columbia Willamette staff requesting individualized approval from PHB for cases where the tenant would like to relocate out of Portland city limits. Up to 5 exemptions per fiscal year will be allowed.
 - b. Residents of all of Multnomah County will be eligible for financial assistance from the County's pool of funds.
- c. United Way of Columbia Willamette shall maintain ongoing communication with ELD program providers, PCC and MPD, to allow for payment of financial assistance in the manner that best resolves the participant's termination or eviction matter.
- d. Documentation Requirements: The City requires the use of the ELD Financial Assistance Intake Form (see Exhibit I) to meet eligibility and documentation requirements for the funds. Multnomah County requires the use of the landlord verification process for County funds. Documents related to participant eligibility, application, documentation of amount owed, and receipt of financial assistance paid shall be retained for five (5) years by United Way of Columbia Willamette.

C. Outreach

- a. Provide targeted outreach to engage with vulnerable communities in the City of Portland with a focus on BIPOC renters and renters living in East Portland, as these communities are disproportionately impacted by evictions.
- b. United Way of the Columbia Willamette will make direct referrals to the PCC CLEAR Clinic through targeted outreach efforts to residents living in East Portland.
- c. United Way of the Columbia Willamette will work with their Marketing/Communications team, Community-Based Organizations, and Eviction Legal Defense Partner Organizations to engage in this targeted outreach.
- d. Demographic and geographic information gathered under the scope of this contract will be used in refining and revising the outreach plan throughout the duration of the Program.

D. ELD Coordination

United Way of the Columbia Willamette agrees to participate in a weekly client review check-in with PCC CLEAR Clinic and Metropolitan Public Defenders to discuss updates about outreach referrals, current caseloads/pending applications, and program budgets.

Attachment 2: Amended Invoice Form

EXHIBIT E
United Way FY 24.25 Financial Assistance for Eviction Legal Defense
Invoice

Request for Payment #: _____ Contract #: 32003482 Billing Period: _____

[Funding Source: Multnomah County]

CATEGORY	BUDGET	AMOUNT THIS INVOICE	BILLED YTD	BALANCE
Personnel				
Operating				
Direct Client Assistance	450,000			
Admin Direct Costs	50,000			
Indirect Costs				
TOTAL	500,000			

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: _____

United Way FY 24.25 Financial Assistance for Eviction Legal Defense

Invoice

Request for Payment #: _____

Contract #: 32003482

Billing Period: _____

[Funding Source: Rental Registry]

CATEGORY	BUDGET	AMOUNT THIS INVOICE	BILLED YTD	BALANCE
Personnel	134,326			
Operating	19,955			
Direct Client Assistance	861,500			
Admin Direct Costs	104,219			
Indirect Costs				
TOTAL	1,120,000			

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 G
Eviction Legal Defense Program Financial Assistance Program Guidance and Intake
Form/Certificate of Eligibility Forms & Program Guidance
EVICTION LEGAL DEFENSE PROGRAM (ELDP)

PURPOSE

The Eviction Legal Defense Financial Assistance Program (ELDFA) provides financial assistance to prevent households from experiencing evictions and housing insecurity. The priority is to serve communities experiencing the greatest adverse impacts from the state's housing and homelessness crisis, including Black, Indigenous, and other People of Color (BIPOC) and households with very-low incomes. The program includes funding from the City of Portland's Rental Registration fund.

ELDFA can only serve households who are receiving legal representation through the ELDP and can only pay for expenses necessary to resolve a termination notice, pending termination of a housing subsidy, or an eviction court case. Households are eligible for a maximum amount of \$6,000 in assistance with expenses related to their eviction case. These expenses **may** include rent arrears, **current month's rent, one month of future rent**, late rent fees, noncompliance fees, property damage charges, utility charges when included with rent, court costs, and opposing attorney's fees with a maximum of \$600.00.

Funds must be expended by June 30th, 2025, and invoiced by July 3rd, 2025.

ELIGIBLE HOUSEHOLDS

To be eligible for ELDFA, households must meet all three of the requirements below. There is no citizenship requirement for these funds.

1. Represented by a lawyer or legal professional through the Eviction Legal Defense (ELD) program. To be eligible for ELDP the household must:
 - a. Reside as a tenant in a rental unit within Portland City limits;
 - b. Have a total household income at or below 60% Area Median Income (AMI); and
 - c. Be at risk of eviction due to receiving a termination notice, a notice of housing subsidy termination, or a summons for an eviction court case.
2. Reside in a rental unit that is not owned or managed by the parent, child, aunt, uncle, grandparent, grandchild, sister, or brother of any member of the household (tenancy must be the result of an arm's length transaction).
3. Funds must be necessary to resolve a termination notice, pending termination of a housing subsidy, or an eviction court case.

ELIGIBLE EXPENSES

- Rent arrears and late fees
- Current month's rent
- One month of future rent
- Noncompliance fees
- Utilities paid to landlord (water, sewer, garbage)
- Property damage that is the responsibility of the household

- Court costs related to the FED case
- Moving Costs - If moving is part of the eviction agreement or stipulated agreement, future rent can be paid to a new landlord. Funds set aside for future rent for a new landlord must be paid within 60 days from move-out. (Future rent funds may not be used for temporary housing assistance, and instead must be paid towards a future sustainable housing solution.)
- Clients are able to access up to \$1,800 in temporary housing services. This \$1,800 counts towards the \$6,000 that each client has access to. These services include:
 - Hotel/Motel stays:
 - Future housing must be secured prior to the motel stay to access assistance to pay for the hotel stay. Proof of secured housing must be established by submitting a copy of a signed lease, an agreement to execute a rental agreement, or an email confirmation of lease from the landlord or property manager. This information must accompany the request for temporary housing assistance for a hotel stay to be approved.
 - The maximum hotel stay cannot exceed 7 days.
 - The cost of the hotel stay cannot exceed \$1,000 (the intent is to preserve funds to ensure that as much funding remains available to help secure stable housing)
 - Relocation Assistance
 - Total relocation assistance costs between these two categories cannot exceed \$800. The program maximum per client is \$6,000. Clients can access legal services as many times as program capacity allows but may not receive more than \$6,000 in financial assistance total. The \$6,000 cap is cumulative, not per instance of contact.
 - Moving costs:
 - Moving costs are allowable for tenants who through a move out agreement are required to exit their current unit
 - If funds are needed to secure a moving truck, the rental must be in the client's name, and a copy of their driver's license must be kept on file.
 - Storage Units
 - All storage units must be secured in the client's name and the client agrees to provide the storage company with a forwarding address upon exit.
 - Storage can only be secured for the time between moving out of the unit, and moving into the newly secured unit (60 days)
 - Requests for storage without having a unit secured cannot exceed more than 60 days
 - Total relocation assistance costs between these two categories cannot exceed \$800. The program maximum per client is \$6,000. Clients can access legal services as many times as program capacity allows but may not receive more than \$6,000 in financial assistance total. The \$6,000 cap is cumulative, not per instance of contact.
 - Opposing party attorney fees will be paid at a maximum of \$600.

Not eligible: *direct household assistance*

ASSISTANCE LIMITS

Referrals will be served on a first come first served basis until funding has been exhausted for that month, with priority given to referrals received through UW's outreach efforts. There is a \$6,000.00 limit set per household.

TEMPORARY HOUSING ASSISTANCE PAYMENT PROCEDURES

When requesting ELD temporary housing assistance, partner agrees to provide United Way with:

1. 24-hour notice to access all temporary housing services to include, requests for motels, motel extensions, storage, moving assistance, and other services associated with temporary housing assistance.
2. Motel stays will be selected using the preferred vendors list (vendors will be added to the list as time allows, however, requests will be made using the current vendors on the list)
3. To minimize the potential of no shows, cancellations, and refunds, reservations will not be scheduled with moving assistance or check-ins to happen over the weekend. Check-ins will be confirmed prior to the close of business on the day of the reservation. If client has not checked in by the end of day, the reservation will be cancelled to avoid any unnecessary charges.
4. Any special arrangements for check-ins that differ from this agreement must be received and approved before 1:00 on the day of the reservation.

CLIENT ASSISTANCE PAYMENT REQUEST PROCEDURES

- Referral payment requests must be first searched in HMIS prior to their submission to United Way to ensure the request does not exceed client spending limits, (\$6,000.00). If the client does not appear in HMIS, the client's program eligibility must first be approved by UW staff.
- Referral requests must be submitted to United Way at the time the payment is ready to be paid and processed.
- United Way will provide approvals within 24 hours (same day in most cases) of receiving the initial request.
- If requested by the attorney, United Way will provide a Letter of Intent that specifies the amount(s) we intend to pay based on the approved request. The letter of intent will also request a copy of the W9 unless one has been provided by the attorney or there is one on file.
- Payment will be made immediately upon receipt of the W9.
- Payment requests can be submitted any day of the week; however, United Way will process and mail checks on Tuesday and Thursday each week.
- Arrangements to pick up a check must be made in advance on Tuesday as checks will be made available for pick up only on Thursdays at the United Way offices.

STEPS TO RECEIVE FINANCIAL ASSISTANCE

Legal Services Provider

1. Complete all forms of ELDFFA Application Packet, including:
 - (1) Intake Form/Certificate of Eligibility.

(2) ELD Release of Information

2. Collect the required tenant documents to submit together with the application packet.
3. Send application and required documents to United Way of Columbia Willamette.

Fiscal Sponsor

1. If Payment to a Landlord:
 - (1) Agreement to Landlord Information Forms (includes a W-9 for Landlord)
2. If Payment to a new Landlord:
 - (1) Agreement to Landlord Information Forms
 - (2) Copy of stipulated agreement indicating move-out is a condition of agreement
3. If Payment into Court:
 - (1) Attorney Verification Form
4. Ensure client file includes all the required information, which is included in the table below
5. Arrange for payment to the Landlord/Landlord’s attorney or payment into Multnomah County Circuit Court

Information Required	Documents to Use
General Client Information	Application at intake to ELD
Tenancy within the City of Portland Verification	Document tenancy within the City of Portland on <u>Intake Form/Certification of Eligibility</u> . Tenancy will be verified by the <u>Landlord Information Forms</u> or <u>Attorney Verification Form</u> (if rent is being paid into court).
Tenancy Result of Arm’s Length Transaction	<u>Intake Form/Certification of Eligibility</u>
Documentation of Necessary Expenses to Resolve Termination Notice, Pending Termination of Housing Subsidy, or Eviction case	Document expenses on <u>Intake Form/Certification of Eligibility</u> . Expenses will be verified by the <u>Landlord Information Forms</u> .
Release of Information	Should cover Portland Housing Bureau. If PCC or MPD is referring clients for Financial Assistance, release should also cover OLC. If OLC is referring clients to PCC or MPD for eviction set aside services, release should cover PCC and MPD. Must have a time limit. Must have all adults sign.
Proof of Payment	Proof of your payment, such as: copies of check requests, copies of checks, and dates of service.

Nondiscrimination

Your agency is required to comply with all state and federal statutes relating to nondiscrimination. Your agency may not take any of the following actions based on race, color, national origin, religion, sex, familial status or handicap:

- Refuse to rent housing or provide services
- Make housing or services unavailable
- Deny a dwelling or service
- Set different terms, conditions or privileges for rental of a dwelling or obtaining services
- Provide different housing services or facilities or different services
- Falsely deny that housing is available for inspection or rental or that services are available
- Deny anyone access to a facility or service

To file a formal complaint, please visit the Bureau of Labor and Industries website, and complete the questionnaire on the [Civil Rights Webpage](#).



Eviction Legal Defense Program

Client Name: _____
Organization Name: _____
Intake Date: _____
Date Payment Due: _____

FINANCIAL ASSISTANCE INTAKE FORM/CERTIFICATE OF ELIGIBILITY

1. Eligibility Criteria *(all criteria must be met for eligibility)*

- Receiving legal representation through ELD
- Tenant within the City of Portland (confirm address through Portland Maps) Reside in a rental unit that is not owned or managed by the parent, child, aunt, uncle, grandparent, grandchild, sister, or brother of any member of the household
- Total household income is 60% or below area median income (AMI)
- Owe money that must be paid to resolve a pending termination notice, pending housing subsidy termination, or eviction case that the household is receiving assistance with through ELD

2. Verification of Tenancy Within the City of Portland

Address of subject rental unit:

Is rental unit within the City of Portland?

- Yes
- No

3. Verification of Residence in Rental Unit Resulting from Arm's Length Transaction

Is rental unit owned or managed by the parent, child, aunt, uncle, grandparent, grandchild, sister, or brother of any member of the household?

Yes - (if yes, describe why this tenancy may still be considered the result of an arm's length transaction)

No

Describe: _____

4. ELDFFA Income Eligibility Determination

Please use the PHB AMI table [HERE](#) when determining client ELDFFA Income Eligibility.

Amount of Monthly Income: _____

Income Source: _____

Number of Individuals in the Household: _____

Client % AMI : _____ %

REMINDER: To be eligible for ELDFFA, the client must be at 60% AMI or below

STEPS TO VERIFY INCOME:

Step 1 – Determine amount of requested financial assistance

- If requested financial assistance is \$4,000 or below: Client may self-attest to income by signing this Intake/Certification of Eligibility. No further verification is required.
- If requested financial assistance is greater than \$4,000: Client must verify income as outlined in Step 2.

Step 2 – Verify income for all clients requesting financial assistance above \$4,000 as follows:

Option 1: Household self-attesting to income eligibility and in a census tract with average incomes that are at or below 60% of AMI. If the household lives in the following census tracks, no additional documentation of household income is needed beyond self-attestation:

11.01	49	79	92.01	101
16.02	51	81	92.02	103.04
21	52	82.02	93.01	104.05
23.03	55	83.01	96.06	104.08
27.02	56	83.02	97.01	104.10
29.03	73	84	97.02	104.11
33.01	74	89.02	98.01	106
40.01	76	90	98.03	
48	77	91.01	100.01	

Fact specific proxy: *Household lives in census* incenssucenssucencen

7. Head of Household Information and Landlord

Head of Household (First and Last)		Phone Number
Race		Primary Language Spoken
Physical or mental impairment: Yes No	Gender:	
Email Address	Are there children in the household? Yes No	
Street Address		
City	State	ZIP

Landlord Information

Name		Phone Number
Street Address		
City	State	ZIP
Email		

8. Signature and Self-Attestation

"I certify that the information on this intake form is true and accurate to the best of my knowledge. I also certify that I have not received financial assistance for the same month(s) from a different organization or program."

Client Signature _____

Date _____

Client Name _____

Case Worker/Agency Staff Signature _____

Date _____

Case Worker/Agency Staff Email _____

Phone _____

