

PROJECT PATH:

PRACTICAL ASSISTANCE THROUGH TRANSITIONAL HOUSING

HB 4123 COORDINATED HOMELESS RESPONSE PILOTS – NOVEMBER 2023 LEGISLATIVE REPORT

INTRODUCTION

The Cities of Hermiston, Umatilla, Stanfield and Echo are working in partnership with Umatilla County to establish a program and develop a site to implement Project PATH (Practical Assistance through Transitional Housing). This partnership will also benefit other Umatilla County west end communities. The intent is to bring together various services available to assist individuals and families facing homelessness with the objective to move them into and through transitional housing to permanent housing. An integral part of Project PATH will be the suite of services that will be available to participants within the HUES area. A major component of Project PATH will include a facility on property owned by Umatilla County within the City of Umatilla urban growth boundary to create a safe space for overnight or longer stays with support services available onsite. The site will have transit services available to it to encourage working during the transition from homelessness to having a home.

Umatilla County received funding under HB 4123 for the purpose of establishing a Coordinated Homeless Response System (CHRS). The grant is administered by the Oregon Department of Administrative Services with state-level support and technical assistance provided by Oregon Housing and Community Services (OHCS). Umatilla County coordinated with west end city managers presented to their council of the four incorporated cities on the opportunity to participate. All cities are signatories to an Intergovernmental Agreement (IGA) executed January 2023. A requirement of CHRS is to establish an Advisory Board, hereinafter referred to as Intergovernmental Advisory Board (IAB), composed of one Representative from each signatory to the HB 4123 IGA. The IAB will meet once per month to discuss planning and decision making. Its purpose is to identify and track the scope of challenges, weaknesses and constraints associated with homelessness and the efforts, services and ordinances to address it across Umatilla County.

Signatures to the IGA and their Representative:
Intergovernmental Advisory Board:

Don Dorrان, Umatilla County, Commissioner
Dave Stockdale, City of Umatilla, Manager
Byron Smith, City of Hermiston, Manager
Ben Burgener, City of Stanfield, Manager
Dave Slaght, City of Echo, Manager

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PATH Website: <https://www.umatilla-city.org/community/page/project-path-practical-assistance-through-transitional-housing>

The Coordinated Homeless Response System requires coordination and development of partnerships with local and regional service providers. A Request for Proposal was advertised to seek a contractor to assist the Pilot Program recipient in fulfilling our obligations to HB 4123 and the formation of Project PATH. Stepping Stones was awarded the contract to assist in fulfilling HB 4123 obligations and the development of Project PATH. An expanded advisory board of IAB hereinafter referred to as Stepping Stones Advisory Board SSAB, will operationalize this requirement.

In addition to the coordination efforts, CHRS must establish a plan to directly coordinate with Rural Oregon Continuum of Care (ROCC). This requirement will be operationalized through coordination with Stepping Stones. Lastly, CHRS requires the establishment of an office, it is coordinated, and the Inter-government Advisory Board (IAB) and the Stepping Stones Advisory Board (SSAB) contribute to the inputs and outputs to the support of the CHRS. Located in the City limits of Umatilla, it will serve as the central service point for persons who are houseless or at risk of homelessness throughout the County. The system office must employ a staff person who is the centralized point of contact. It is responsive in two ways; maintaining a coordinated communication network and identifying unique persons and tracking met and unmet needs.

See attached Appendix A, Intergovernmental Agreement

ORGANIZATIONAL STRUCTURE

The City of Umatilla posted a request for proposal seeking a qualified organization to develop and implement Project PATH. Stepping Stones was awarded the contract. Stepping Stones has since hired staff to help them launch Project PATH.

Jesalyn Cole is the full-time Executive Director and has worked nine years in non-profit organizations. She has spent time serving on several non-profit boards, including five on a school board. She is experienced in advocating for legislative changes, DEI initiatives, and underserved populations. She is bilingual in Spanish and a longtime resident of the Columbia Basin area. She also has a BA in education and a MA in Curriculum and Instruction and holds a certificate in professional fundraising.

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Carolina Delgado is the full-time Navigation Director and is the conduit between guests and the community resources needed. Prior to this role, she worked for nine years as a peer support specialist and community health worker in the area. Carolina is bilingual in Spanish.

Night staff rotating through the nightly shifts to staff the sleep center.

Nick Ducote of Ducote Consultant has been hired to assist in grant funding for site infrastructure.

Carla McLane has been hired for technical assistance with the Strategic Plan.

See attached Appendix B, Request for Proposal

See attached Appendix C, Stepping Stones Proposal

See attached Appendix D, Stepping Stones Agreement

STRATEGIC PLAN PROCESS

Carla McLane was hired for technical assistance in developing the Strategic Plan. With such a short timeline set forth by the state, we used a local consultant who had previous experience. McLane attended and consulted with city councils from the above advisory board. The strategic plan was presented at several public hearings for input and finally adopted by all the jurisdictions of the IAB. The strategic plan was adopted May 16, 2023.

See attached Appendix E, Strategic Plan

STRATEGIC PLAN OUTCOMES

The identified goals and outcomes consist of: providing shelter, service, housing and advocacy to houseless guest. Stepping Stones Alliance has identified that their work will focus on connecting, developing and supporting the goals listed above. Annually the Project PATH Advisory Committee will review this Strategic Plan and if warranted will make changes to assure that these goals are implemented successfully.

Success will be measured by the number of individuals using the services provided by Project PATH. Service provider, Stepping Stones Alliance is a member of the Rural Oregon Continuum of Care (ROCC) and regularly attends the meetings and works closely with the organization.

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Stepping Stones Alliance is a low-barrier shelter where anyone is accepted in and given shelter. This happens on a first come-first serve basis. The SSA board recently adopted a DEI statement: Stepping Stones Alliance (SSA) strives to create a community where all individuals have a safe place to shelter and have access to supports necessary to create stability. We are committed to promoting equitable services and programs, without bias to all who seek shelter with us. SSA will not discriminate against any person on the basis of race, color, religion, creed, political ideas, sex, age, marital status, physical or mental handicap, national origin, or ancestry.

Stepping Stones Alliance hired a Navigation Director in January and she has been working with area organizations and service providers to get partnerships and necessary agreements in place to offer resources and assistance to guests and members. It has been a positive experience and many partnerships have been formed. A convening was held in the spring and over 30 area organizations were represented and worked to create a comprehensive document that lists the organizations, resources, service cross over, and any gaps that exist in the area.

So far, the navigation services offered have been limited because we are still in a temporary space and only offering the overnight Sleep Center. Once on-site navigation services will be available to members.

TECHNICAL ASSISTANCE

Although Project PATH did contact OHCS for technical assistance, we opted out of using their assistance as it was going to take longer than the timeframe we had to complete the strategic plan. Assistance and support is needed in finding funding for sustainability of the program. The SSA Board already had a relationship in place with homeless organizations around the country and has continued to lean on those partners for information, advice and programming specifics.

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DATA

Service provider utilizes HMIS for daily data collection and reporting. Service provider is an active member of the Continuum of Care (Rural Oregon Continuum of Care) and participates in regional meetings related to PiT count and conducting that data collection.

IDENTIFYING, ACCESSING AND ALIGNING FUNDS

Stepping Stones Alliance has been successful in applying for and receiving small grants specific to tangible items needed to further the project (grants were received to purchase a vehicle, technology, items to lessen accessibility barriers). Most grants available to non-profit organizations are specific to projects and not operations. The challenge going forward is to find the funding necessary to maintain the operations. The SSA board is looking at creating two annual fundraisers to contribute to the working fund balance.

COMMUNICATIONS

Regional and community engagement and communication has happened on a variety of levels. The service provider attended several area events with an informational table to share updates with community members. They also made presentations to several area service groups; Rotary, Kiwanis, Lions. Newspaper interviews, radio interviews, and personal outreach meetings have been conducted. Area churches were contacted and information is being shared with congregations. Volunteers and meals have resulted from the various outreach approaches.

There is the PATH website, as well as the service provider's website, Facebook, and Instagram pages. Campaigns have been conducted on the social media platforms sharing partner organization information, sponsor/supporter acknowledgments, as well as weekly needs specific to services. The service provider has attended city council meetings to answer questions both from council members and public citizens. The service provider began partnering with other area agencies to conduct outreach visits to area homeless encampments in order to provide information on the resources available.

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Challenges continue to arise from community members who do not see the need for the benefit in assisting this population in any way. Successes continue to occur as donations and support remain steady. Social media campaigns continue with a Friday grocery list, thankful Thursday, and the latest “worth it Wednesday” posts highlighting those companies, individuals, and entities supporting the work in some specific way.

ADDRESSING RACIAL DISPARITIES

The service provider’s Navigation Director continues to build partnerships with any and all agencies in the area that either have a connection to homelessness or the resources needed to assist the population we are serving. A convening was hosted by the service provider in the spring of 2023 that brought area organizations together for a day of sharing and collaboration. It will be an annual meeting and proved to not only strengthen partnerships but shed light on what gaps exist in the area that need to be improved.

CONNECTIONS TO PERMANENT HOUSING

Currently we have made partnerships with Umatilla County Housing Authority and Capeco to assist transitioning guests into permanent housing.

CONCLUSION

In conclusion, the issue of homelessness in our community is a pressing concern that demands our immediate attention and action. It also requires unique solutions and collaboration from community partners and leadership to achieve meaningful results. The PATH committee has built a coalition of community leaders from local government, health care, education, housing, work force development and others. While we have been successful forming partnerships with existing resource and service providers, working to transition those services to a regional facility has been challenging as existing services are spread between multiple organizations with each organization having different priorities and resources.

In addition, clear guidance or technical assistance outlining design criteria and construction standards for transitional and/or emergency shelters should be created. With housing

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being a legislative priority in the last several years, changes to the building and fire codes have created a discrepancy in permitting and review processes. The 2022 Oregon Structural Specialty Code states in Section 101.2.2.1.14 that transitional housing accommodations is outside the statutory authority of the building code. However, a facility providing sleeping units is classified as a Residential occupancy depending on number of occupants and if they are transient or non-transient in nature. These types of discrepancies have caused delays to our project during the design phases of the project. Providing clear guidance of applicable standards and design criteria would be invaluable to other small communities looking to provide transitional housing service to serve transient and non-transient individuals.

Your commitment to addressing these critical issues will make a significant difference in the lives of vulnerable individuals and families. By allocating resources and providing technical assistance to support homelessness initiatives, we can create lasting change and work toward a community where everyone has access to safe and stable housing.

APPENDICES

- A. Intergovernmental Agreement
- B. Request for Proposal
- C. Stepping Stones Proposal
- D. Stepping Stones Agreement
- E. Strategic Plan

EXHIBIT A

INTERGOVERNMENTAL AGREEMENT

This INTERGOVERNMENTAL AGREEMENT (this "Agreement") is entered into by and between Umatilla County, a political subdivision of the State of Oregon ("County"), the City of Umatilla, an Oregon municipal corporation ("Umatilla"), City of Hermiston, an Oregon municipal corporation ("Hermiston"), City of Echo, an Oregon municipal corporation ("Echo"), and the City of Stanfield, an Oregon municipal corporation ("Stanfield", and collectively with Umatilla, Hermiston, and Echo, the "Cities"; County and the Cities shall hereinafter be referred to collectively as the "Parties" and each, a "Party") as of the date the last party signs this Agreement (the "Effective Date").

RECITALS

A. ORS 190.010 authorizes units of local government to enter into intergovernmental agreements for the performance of any or all functions which a Party has the authority to perform.

B. County has signed a grant agreement with the State of Oregon awarding County \$1,000,000 to establish a coordinated homeless response system consisting of the Parties. The grant agreement is entered pursuant to the terms of HB 4123.

C. The Parties wish to implement HB 4123 and establish a coordinated homeless response system consisting of the County and the Cities ("Project PATH").

NOW, THEREFORE, County and the Cities, on the terms and conditions set forth herein, and for consideration of which the existence and sufficiency is mutually acknowledged, enter into the following Agreement:

AGREEMENT

1. **Project PATH.** Project PATH shall, at a minimum, satisfy the requirements set forth in Exhibit A, attached hereto.

2. **Homeless Response Office.** The Homeless Response Office (required to be established by Exhibit A, Section 1(a)) (the "Office") shall be organized as follows and shall perform the following functions:

- (a) The Office will operate under the general policy guidance of the Homeless Response Advisory Board (required to be established by Exhibit A, Section 1(b)) (the "Advisory Board").
- (b) The Office will primarily consist of a person (the "Director") selected by Umatilla and approved by the Advisory Board. Umatilla may contract for the services provided by the Director. The Director may be any individual or entity duly qualified and willing to serve in the role.
- (c) The Office will coordinate with and develop partnerships with local and regional stakeholders as specified in House Bill 4123, including plans for coordination with any local continuum of care receiving funding under 24 C.F.R. part 578.
- (d) The Office will be managed by the Director who will report to Umatilla and the Advisory Board or their respective designees. The Director will be charged with the general operation of the Office, and shall work to coordinate with Umatilla and the Advisory Board and all Parties to develop a five-year strategic plan and endeavor to meet the project goals set forth in Exhibit A.

3. **Homeless Advisory Board.** The Advisory Board shall be organized as follows and shall perform the following functions:

- (a) The Advisory Board members shall consist of a representative from each Party, and shall be formed for the purposes of providing general guidance to the Office.
- (b) The Advisory Board members shall have the opportunity to make important decisions, including approving a recommendation to the Parties of the strategic plan developed by the Office.
- (c) Given that the Advisory Board is authorized by statute and governed by this Agreement with the authority to make formal advice and recommendations on public policy and administration, the Advisory Board is considered a public body for the purposes of Oregon Public Meetings Law, and will hold noticed meetings open to the public, and otherwise act in accordance with Oregon Public Meetings Law.
- (d) The Advisory Board shall adopt formal Bylaws sufficient to ensure compliance with Oregon Public Meetings Law and the orderly functioning of the Advisory Board. The Bylaws will establish a regular meeting schedule to be observed by the Advisory Board.

4. **Obligations of the Parties.**

- (a) The Parties shall support the Office until this Agreement is terminated.
- (b) The Parties shall cooperate in good faith to ensure that the goals of Project PATH are achieved. The Parties shall work in good faith to amend this Agreement when necessary to achieve the goals set forth in Exhibit A.
- (c) Project PATH will be funded in part with the \$1,000,000 grant from the State of Oregon to County referenced in Recital B, which County will transfer in its entirety to Umatilla upon County's receipt from the State of Oregon and execution of this agreement.
- (d) (i) If this Agreement is terminated, then each Party shall promptly pay a termination fee to Umatilla as set forth in Schedule 4(d) calculated as of the effective date of such termination; or (ii) if any Party withdraws from this Agreement, then such withdrawing Party shall be obligated to pay the termination fee to Umatilla as set forth in Schedule 4(d) calculated as of the effective date of such withdrawal promptly upon Umatilla's request.
- (e) Umatilla shall serve as the fiscal agent responsible for funding the operations of Project PATH. Umatilla will retain fiscal and managerial oversight of Project PATH, including the Office and the Director.
- (f) Under the recommendation of the Advisory Board, Umatilla is authorized to and will select a Director to manage the Office. Umatilla is authorized to terminate the Director, and in such an event, Umatilla is authorized to and will select a new Director. This Agreement does not create any employment or contractual relationship between the Parties or the Office or Director.
- (g) Umatilla is authorized to and will be responsible for all contracting, procurement, or other activities necessary to operate Project PATH, including engaging any third party service providers as Umatilla determines is reasonably necessary.

Umatilla is currently negotiating a Transitional Housing Services Agreement (the "Services Agreement") with Stepping Stones of Hermiston Inc., an Oregon nonprofit corporation, to provide certain services to further the objectives of Project PATH, which Services Agreement shall be subject to review and corresponding recommendation for approval by the Advisory Board, not to be unreasonably withheld, conditioned, or delayed.

- (h) Each of the Parties, the Office, and the Advisory Board shall cooperate with respect to all matters described herein, and shall execute such notifications and other documents as may be reasonably requested for the purpose of giving effect to, or evidencing or giving notice of, the provisions of this Agreement.
- (i) Umatilla's legal counsel may be called upon to provide legal advice to the Advisory Committee and the Office as necessary. Such advice may include, but is not limited to, advice on public meetings law, the requirements of HB 4123, and the formulation of necessary bylaws.

5. **General Terms.**

- (a) **Notice.** The designated representatives of the Parties for the administration of this Agreement are as follows. Notice shall be deemed delivered upon sending an email to all of the Parties.
 - (i) Umatilla County: Dan Dorrان, County Commissioner
Phone: 541-278-6201
Email: dan.dorrان@umatillacounty.gov
 - (ii) City of Umatilla: David Stockdale, City Manager.
Phone: 541-922-3226 x102
Email: david@umatilla-city.org
 - (iii) City of Hermiston: Byron Smith, City Manager
Phone: 541-567-5521
Email: bsmith@hermiston.or.us
 - (iv) City of Echo: David Slaght, City Administrator
Phone: 541-376-6038
Email: dave@echo-oregon.com
 - (v) City of Stanfield: Benjamin Burgener, City Manager
Phone: 541-449-3831
Email: citymanager@cityofstanfield.com
- (b) **Entire Agreement.** This Agreement, together with the recitals above and exhibit attached hereto, which are incorporated herein by this reference, constitute the entire agreement among the Parties on the subject matter hereof. There are no understandings, agreements, or representations, oral or written not specified herein regarding such subject matter. No waiver, consent modification or change of terms of this Agreement shall bind any Party unless in writing and signed by all Parties. Such waiver, consent, modification or change, if made, shall be effective only in the specific instance and for the specific purpose given.
- (c) **Severability.** The determination that any provision of this Agreement is invalid or unenforceable will not affect the validity or enforceability of the remaining provisions or of that provision under other circumstances. Any invalid or unenforceable provision will be enforced to the maximum extent permitted by law.
- (d) **Term; Termination.** The initial term of this Agreement shall commence on _____, 2022 ("Commencement Date"), and end on June 30, 2024 (the "Initial Term"). County, Hermiston, Stanfield, and Echo may not voluntarily

terminate or withdraw from this Agreement during the Initial Term. The term of this Agreement shall automatically renew for additional successive 12-month periods, subject to the termination and withdrawal rights provided herein. After the Initial Term, any Party may withdraw from this Agreement upon 180 days' prior written notice to the other Parties. Additionally, Umatilla may terminate this Agreement effective immediately or force a breaching Party to withdraw from this Agreement upon the material breach of any other Party. If any Party shall file or suffer the filing of a bankruptcy or similar proceeding, such filing shall constitute a material breach of this Agreement. Any termination of or withdrawal from this Agreement is subject to the termination fees described in Section 4(d).

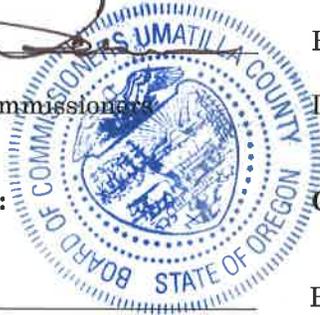
- (e) Counterparts. This Agreement may be executed in counterparts, each of which shall be deemed an original, but all of which together shall constitute one and the same instrument. Execution of this Agreement by electronic means intended to preserve the original pictorial appearance of this Agreement or by industry standard electronic signature software shall have the same legal force and effect as execution by original signatures.
- (f) Access to Records/Record Retention. The Parties shall maintain fiscal records and all other records pertinent to this Agreement.
 - (i) All fiscal records shall be maintained pursuant to generally accepted accounting standards, and other records shall be maintained to the extent necessary to clearly reflect actions taken.
 - (ii) All records shall be retained and kept accessible for at least three years, or as otherwise required to be retained by Oregon law.
 - (iii) If an audit, litigation or other action involving this Agreement is started before the end of the three-year period, the records shall be retained until all issues arising out of the action are resolved or until the end of the three- year period, whichever is later.
 - (iv) The Parties and their authorized representatives shall have the right to access all of associated books, documents, papers and records related to this Agreement for the purpose of conducting audits and examinations and making copies, excerpts and transcripts.
- (g) Indemnification. Subject to the limits of the Oregon Tort Claims Act and the Oregon Constitution, each Party shall defend, indemnify, and hold each other Party, and its officers, agents, employees and volunteers, harmless against all liability, claims, losses, demands, suits, fees and judgments (collectively referred to as "claims") that may be based on, or arise out of, damage or injury (including death) to persons or property to the extent caused by or resulting from the indemnifying Party's: (1) negligence or willful misconduct in connection with the performance of this Agreement or by conditions created thereby; (2) breach of this Agreement; or (3) violation of any statute, ordinance or regulation. The Parties are not agents of each other and are not entitled to indemnification and defense under ORS 30.285 and ORS 30.287.
- (h) Survival. All covenants, indemnifications, and agreements contained in this Agreement that contemplate performance subsequent to the expiration or earlier termination of this Agreement, or that cannot be ascertained or fully performed until after expiration or earlier termination of this Agreement, shall survive such expiration or termination.

[Signature page follows]

IN WITNESS WHEREOF, the parties hereto have caused this Agreement to be executed as of the Effective Date by their respective officers thereunto duly authorized.

UMATILLA COUNTY:

By: 
Name: Daniel N. Dorran
Title: Chair, Board of Commissioners
Date: January 20, 2023



CITY OF UMATILLA:

By: 
Name: David Stockdale, City Manager
Date: _____

CITY OF HERMISTON:

By: _____
Name: _____
Title: _____
Date: _____

CITY OF ECHO:

By: _____
Name: _____
Title: _____
Date: _____

CITY OF STANFIELD:

By: _____
Name: _____
Title: _____
Date: _____

IN WITNESS WHEREOF, the parties hereto have caused this Agreement to be executed as of the Effective Date by their respective officers thereunto duly authorized.

UMATILLA COUNTY:

By: _____
Name: _____
Title: _____
Date: _____

CITY OF HERMISTON:

By: 
Name: Byron D. Smith
Title: City Manager
Date: 11/2/2022

CITY OF STANFIELD:

By: _____
Name: _____
Title: _____
Date: _____

CITY OF UMATILLA:

By: _____
David Stockdale, City Manager
Date: _____

CITY OF ECHO:

By: _____
Name: _____
Title: _____
Date: _____

IN WITNESS WHEREOF, the parties hereto have caused this Agreement to be executed as of the Effective Date by their respective officers thereunto duly authorized.

UMATILLA COUNTY:

By: _____
Name: _____
Title: _____
Date: _____

CITY OF HERMISTON:

By: _____
Name: _____
Title: _____
Date: _____

CITY OF STANFIELD:

By: _____
Name: _____
Title: _____
Date: _____

CITY OF UMATILLA:

By: _____
David Stockdale, City Manager
Date: _____

CITY OF ECHO:

By:  _____
David Slaght, City Administrator
Date: 11-8-22

IN WITNESS WHEREOF, the parties hereto have caused this Agreement to be executed as of the Effective Date by their respective officers thereunto duly authorized.

UMATILLA COUNTY:

CITY OF UMATILLA:

By: _____
Name: _____
Title: _____
Date: _____

By: _____
David Stockdale, City Manager
Date: _____

CITY OF HERMISTON:

CITY OF ECHO:

By: _____
Name: _____
Title: _____
Date: _____

By: _____
Name: _____
Title: _____
Date: _____

CITY OF STANFIELD:

By:  _____
Name: Benjamin Burgener
Title: City Manager
Date: 10/18/2022

Exhibit A

Project PATH Description

[Attached.]

Schedule 4(d)

Termination Fee Schedule

Calendar Year Termination Occurs	Total Termination Fee	Party	Party's Termination Fee Percentage	Party's Termination Fee Amount
2024	\$712,000	County	30%	\$213,600
		Hermiston	30%	\$213,600
		Stanfield	6%	\$42,720
		Echo	4%	\$28,480
2025	\$623,000	County	30%	\$186,900
		Hermiston	30%	\$186,900
		Stanfield	6%	\$37,380
		Echo	4%	\$24,920
2026	\$534,000	County	30%	\$160,200
		Hermiston	30%	\$160,200
		Stanfield	6%	\$32,040
		Echo	4%	\$21,360
2027	\$445,000	County	30%	\$133,500
		Hermiston	30%	\$133,500
		Stanfield	6%	\$26,700
		Echo	4%	\$17,800
2028	\$356,000	County	30%	\$106,800
		Hermiston	30%	\$106,800
		Stanfield	6%	\$21,360
		Echo	4%	\$14,240
2029	\$267,000	County	30%	\$80,100
		Hermiston	30%	\$80,100
		Stanfield	6%	\$16,020
		Echo	4%	\$10,680
2030	\$178,000	County	30%	\$53,400
		Hermiston	30%	\$53,400
		Stanfield	6%	\$10,680
		Echo	4%	\$7,120
2031	\$89,000	County	30%	\$26,700
		Hermiston	30%	\$26,700
		Stanfield	6%	\$5,340
		Echo	4%	\$3,560
2032	\$0.00	County	30%	\$0.00
		Hermiston	30%	\$0.00
		Stanfield	6%	\$0.00
		Echo	4%	\$0.00

EXHIBIT A

GRANT AGREEMENT

Title: House Bill 4123 (2022 Regular Session) General Fund Grant

Agreement Number: 107-2022-4123-08

This grant agreement (“Contract”), dated as of the date the Contract is fully executed, is made by the State of Oregon, acting by and through its Department of Administrative Services (“DAS” or “State”), and Umatilla County (“Recipient”). This Contract becomes effective only when fully signed and approved as required by applicable law (the “Effective Date”) and, unless earlier terminated, expires on June 30, 2023 (the “Expiration Date”). The period from the Effective Date through the Expiration Date is hereinafter referred to as the “Grant Term.” **Certain terms of the Contract survive its termination or expiration as set forth in Section 8.K below.**

The Contract includes attached Exhibit A - Project Description, which is incorporated by this reference.

Pursuant to the Oregon Laws 2022, chapter 70, section 3 (the “Authorization”), the Oregon Legislature appropriated \$1,000,000 from the General Fund for a grant to Recipient to establish a coordinated homeless response system consisting of Recipient, the City of Umatilla, the City of Stanfield, the City of Echo, the City of Hermiston and any other parties to the agreement forming the response system, as more particularly described in Exhibit A (the “Project”).

SECTION 1 – GRANT

DAS shall provide Recipient, and Recipient shall accept from DAS, a grant (the “Grant”) in the amount of \$1,000,000.

Conditions Precedent. DAS’s obligations are subject to the receipt of the following items, in form and substance satisfactory to DAS and its counsel:

- (1) This Contract duly signed by an authorized officer of Recipient; and
- (2) Such other certificates, documents, opinions, and information as DAS may reasonably require.

SECTION 2 – DISBURSEMENT

- A. Full Disbursement. Upon satisfaction of all conditions precedent, DAS shall disburse the full Grant to Recipient.
- B. Condition to Disbursement. DAS has no obligation to disburse funds unless, in the reasonable exercise of its administrative discretion, it has sufficient funding, appropriations, limitations, allotments and other expenditure authority to make the disbursement.

SECTION 3 - USE OF GRANT

- A. Use of Grant Moneys. Recipient shall use the Grant to implement the Project, as more particularly described in Exhibit A.
- B. Costs Paid for by Others. Recipient may not use any of the Grant to cover costs to be paid for by another State of Oregon agency or any third party.

SECTION 4 - REPRESENTATIONS AND WARRANTIES OF RECIPIENT

Recipient represents and warrants to DAS:

A. Organization and Authority.

- (1) Recipient is a county validly organized and existing under the laws of the State of Oregon.
- (2) Recipient has all necessary right, power and authority under its organizational documents and under Oregon law to (a) execute and deliver this Contract, (b) incur and perform its obligations under this Contract, and (c) receive the Grant funds.
- (3) This Contract has been authorized by an ordinance, order or resolution of Recipient's governing body.
- (4) This Contract has been duly executed by Recipient, and when executed by DAS, is legal, valid and binding, and enforceable in accordance with their terms.

B. Full Disclosure. Recipient has disclosed in writing to DAS all facts that materially adversely affect its ability to perform all obligations required by this Contract. Recipient has made no false statements of fact, nor has it omitted information necessary to prevent any statements from being misleading. The information contained in this Contract is true and accurate in all respects.

C. Pending Litigation. Recipient has disclosed in writing to DAS all proceedings pending (or to the knowledge of Recipient, threatened) against or affecting Recipient, in any court or before any governmental authority or arbitration board or tribunal, that, if adversely determined, would materially adversely affect the ability of Recipient to perform all obligations required by this Contract.

D. No Defaults. No Defaults or Events of Default exist or occur upon authorization, execution or delivery of this Contract.

E. Compliance with Existing Agreements and Applicable Law. The authorization and execution of, and the performance of all obligations required by, this Contract will not: (i) cause a breach of any agreement or instrument to which Recipient is a party; (ii) violate any provision of the charter or other document pursuant to which Recipient was organized or established; or (iii) violate any laws, regulations, ordinances, resolutions, or court orders related to Recipient or its properties or operations.

SECTION 5 - COVENANTS OF RECIPIENT

Recipient covenants as follows:

A. Notice of Adverse Change. Recipient shall promptly notify DAS of any adverse change in the activities, prospects or condition (financial or otherwise) of Recipient related to the ability of Recipient to perform all obligations required by this Contract.

B. Compliance with Laws. Recipient shall comply with all applicable laws, rules, regulations and orders of any court or governmental authority that relate to this Contract and Recipient's use of the Grant funds.

C. Annual Progress Reports. Recipient must submit to DAS annual progress reports (each a "Progress Report") until Grant funds are fully expended. A Progress Report is due one year from distribution of funding and thereafter annually until the Grant funds are fully expended. Each Progress Report shall contain a brief narrative and financial report on the total use of Grant funds. The narrative and financial report should include, but need not be limited to, the following information:

- (1) Brief description of the Project and use of Grant funds to date;
- (2) Timeline for major Project deliverables;
- (3) Grant funds spent to date; and
- (4) Project milestones met to date.

- D. Books and Records. Recipient shall keep accurate books and records of the uses of the Grant and maintain them according to generally accepted accounting principles.
- E. Inspections; Information. Recipient shall permit DAS and any party designated by DAS to inspect and make copies, at any reasonable time, of any accounts, books, and records, including, without limitation, its records regarding receipts, disbursements, contracts, investments and any other related matters. Recipient shall supply any related reports and information as DAS may reasonably require.
- F. Records Maintenance. Recipient shall retain and keep accessible all books, documents, papers, and records that are directly related to this Contract for a minimum of six years beyond the later of the final and total expenditure or disposition of the Grant. If there are unresolved issues at the end of such period, Recipient shall retain the books, documents, papers and records until the issues are resolved.
- G. Notice of Default. Recipient shall give DAS prompt written notice of any Default as soon as any senior administrative or financial officer of Recipient becomes aware of its existence or reasonably believes a Default is likely.
- H. Contribution.
- 1) If any third party makes any claim or brings any action, suit or proceeding alleging a tort as now or hereafter defined in ORS 30.260 ("Third Party Claim") against State or Recipient with respect to which the other Party may have liability, the notified Party must promptly notify the other Party in writing of the Third Party Claim and deliver to the other Party a copy of the claim, process, and all legal pleadings with respect to the Third Party Claim. Each Party is entitled to participate in the defense of a Third-Party Claim, and to defend a Third-Party Claim with counsel of its own choosing. Receipt by a Party of the notice and copies required in this paragraph and meaningful opportunity for the Party to participate in the investigation, defense and settlement of the Third-Party Claim with counsel of its own choosing are conditions precedent to that Party's liability with respect to the Third-Party Claim.
 - 2) With respect to a Third Party Claim for which State is jointly liable with Recipient (or would be if joined in the Third Party Claim), State shall contribute to the amount of expenses (including attorneys' fees), judgments, fines and amounts paid in settlement actually and reasonably incurred and paid or payable by Recipient in such proportion as is appropriate to reflect the relative fault of the State on the one hand and of the Recipient on the other hand in connection with the events which resulted in such expenses, judgments, fines or settlement amounts, as well as any other relevant equitable considerations. The relative fault of State on the one hand and of Recipient on the other hand shall be determined by reference to, among other things, the Parties' relative intent, knowledge, access to information and opportunity to correct or prevent the circumstances resulting in such expenses, judgments, fines or settlement amounts. State's contribution amount in any instance is capped to the same extent it would have been capped under Oregon law, including the Oregon Tort Claims Act, ORS 30.260 to 30.300, if State had sole liability in the proceeding.
 - 3) With respect to a Third Party Claim for which Recipient is jointly liable with State (or would be if joined in the Third Party Claim), Recipient shall contribute to the amount of expenses

(including attorneys' fees), judgments, fines and amounts paid in settlement actually and reasonably incurred and paid or payable by State in such proportion as is appropriate to reflect the relative fault of Recipient on the one hand and of State on the other hand in connection with the events which resulted in such expenses, judgments, fines or settlement amounts, as well as any other relevant equitable considerations. The relative fault of Recipient on the one hand and of State on the other hand shall be determined by reference to, among other things, the Parties' relative intent, knowledge, access to information and opportunity to correct or prevent the circumstances resulting in such expenses, judgments, fines, or settlement amounts. Recipient's contribution amount in any instance is capped to the same extent it would have been capped under Oregon law, including the Oregon Tort Claims Act, ORS 30.260 to 30.300, if it had sole liability in the proceeding.

SECTION 6 - DEFAULTS

Any of the following constitutes an "Event of Default":

- A. Any false or misleading representation is made by or on behalf of Recipient, in this Contract or in any document provided by Recipient related to this Grant.
- B. Recipient fails to perform any obligation required under this Contract, other than those referred to in subsection A of this section 6, and that failure continues for a period of 10 business days after written notice specifying such failure is given to Recipient by DAS. DAS may agree in writing to an extension of time if it determines Recipient instituted and has diligently pursued corrective action.

SECTION 7 - REMEDIES

- A. Remedies. Upon any Event of Default, DAS may pursue any or all remedies in this Contract and any other remedies available at law or in equity to enforce the performance of any obligation of Recipient. Remedies may include, but are not limited to any one or more of the following:
 - (1) Terminating DAS's commitment and obligation to make the Grant.
 - (2) Barring Recipient from applying for future awards.
 - (3) Withholding amounts otherwise due to Recipient for application to the payment of amounts due under this Contract.
 - (4) Requiring repayment of the Grant and all interest earned by Recipient on those Grant funds.
- B. Application of Moneys. Any moneys collected by DAS pursuant to section 7.A will be applied first, to pay any attorneys' fees and other fees and expenses incurred by DAS; then, as applicable, to repay any Grant proceeds owed; then, to pay other amounts due and payable under this Contract, if any.
- C. No Remedy Exclusive; Waiver; Notice. No remedy available to DAS is intended to be exclusive, and every remedy will be in addition to every other remedy. No delay or omission to exercise any right or remedy will impair or is to be construed as a waiver of such right or remedy. No single or partial exercise of any right power or privilege under this Contract will preclude any other or further exercise thereof or the exercise of any other such right, power or privilege. DAS is not required to provide any notice in order to exercise any right or remedy, other than notice required in section 7 of this Contract.

If to Recipient: Umatilla County
ATTN: Robert Pahl, CFO
216 SE 4th St. Room 116
Pendleton, OR 97801
robert.pahl@umatillacounty.gov

- E. No Construction against Drafter. This Contract is to be construed as if the parties drafted it jointly.
- F. Severability. If any term or condition of this Contract is declared by a court of competent jurisdiction as illegal, invalid or unenforceable, that holding will not invalidate or otherwise affect any other provision.
- G. Amendments, Waivers. This Contract may not be amended without the prior written consent of DAS (and when required, the Department of Justice) and Recipient. This Contract may not be amended in a manner that is not in compliance with the Authorization. No waiver or consent is effective unless in writing and signed by the party against whom such waiver or consent is sought to be enforced. Such waiver or consent will be effective only in the specific instance and for the specific purpose given.
- H. Attorneys' Fees and Other Expenses. To the extent permitted by the Oregon Constitution and the Oregon Tort Claims Act, the prevailing party in any dispute arising from this Contract is entitled to recover its reasonable attorneys' fees and costs at trial and on appeal. Reasonable attorneys' fees cannot exceed the rate charged to DAS by its attorneys.
- I. Choice of Law; Designation of Forum; Federal Forum. The laws of the State of Oregon (without giving effect to its conflicts of law principles) govern all matters arising out of or relating to this Contract, including, without limitation, its validity, interpretation, construction, performance, and enforcement.

Any party bringing a legal action or proceeding against any other party arising out of or relating to this Contract shall bring the legal action or proceeding in the Circuit Court of the State of Oregon for Marion County (unless Oregon law requires that it be brought and conducted in another county). Each party hereby consents to the exclusive jurisdiction of such court, waives any objection to venue, and waives any claim that such forum is an inconvenient forum.

Notwithstanding the prior paragraph, if a claim must be brought in a federal forum, then it must be brought and adjudicated solely and exclusively within the United States District Court for the District of Oregon. This paragraph applies to a claim brought against the State of Oregon only to the extent Congress has appropriately abrogated the State of Oregon's sovereign immunity and is not consent by the State of Oregon to be sued in federal court. This paragraph is also not a waiver by the State of Oregon of any form of defense or immunity, including but not limited to sovereign immunity and immunity based on the Eleventh Amendment to the Constitution of the United States.

- J. Integration. This Contract (including all exhibits, schedules, or attachments, if any) constitutes the entire agreement between the parties on the subject matter. There are no unspecified understandings, agreements or representations, oral or written, regarding this Contract.
- K. Survival. The following provisions survive expiration or termination of this Contract: Sections 5.C., 5.E., 5.F., 5.H., 6, 7, 8.H., 8.I and 8.K.
- L. Execution in Counterparts. This Contract may be signed in several counterparts, each of which is an original and all of which constitute one and the same instrument.

Recipient, by its signature below, acknowledges that it has read this Contract, understands it, and agrees to be bound by its terms and conditions.

STATE OF OREGON
acting by and through its
Department of Administrative Services

RECIPIENT

By: *Katon*

By: *[Signature]*

Date: 5/31/22

Date: 5/24/2020

APPROVED AS TO LEGAL SUFFICIENCY IN ACCORDANCE WITH ORS 291.047:

Sam Zeigler, Senior Assistant Attorney General, via email dated 4/15/2022



EXHIBIT A
PROJECT DESCRIPTION

Pursuant to the Authorization, Recipient shall use Grant funds for the Project as follows:

(1) Within 90 days of receiving the Grant funds, Recipient shall enter into an agreement among Recipient, the City of Umatilla, the City of Stanfield, the City of Echo, the City of Hermiston, and any other parties to the agreement to create a coordinated homeless response system (the "System") that consists of, at a minimum:

- (a) The establishment of a coordinated homeless response office;
- (b) An advisory board with representation from the governing body of each member government;
- (c) Specific roles of each member to support the advisory board and office;
- (d) Plans for coordination with any local continuum of care receiving funding under 24 C.F.R. part 578; and
- (e) The establishment of a centralized point of contact for the office.

(2) The System, with Recipient's oversight, shall use the Grant funds to:

- (a) Hire necessary staff for the office;
- (b) Support coordinated communications and public engagement;
- (c) Support community outreach and policy development, including stipends for people with current or recent lived experience of homelessness;
- (d) Acquire technical assistance and capacity building, including contracting with consultants; and
- (e) Pay for other expenses reasonably necessary to meet the requirements in this Exhibit A.

(3) Within one year of receiving the Grant funds, the System, through the advisory board or each member government to the agreement, shall adopt a five-year strategic plan that will identify and set goals for addressing:

- (a) Funding to support the ongoing operations of the System;
- (b) Increasing or streamlining resources and services to people at risk of or experiencing homelessness within the participating cities and counties;
- (c) Incorporating national best practices for ending homelessness;
- (d) Eliminating racial disparities within homeless services within the service area; and
- (e) Creating pathways to permanent and supportive housing that is affordable to local populations experiencing or at risk of homelessness.

(4) No later than November 15, 2023, and September 15, 2024, the System shall provide a report to the Housing and Community Services Department, Oregon Housing Stability Council and one or more appropriate interim committees of the Legislative Assembly in the manner provided in ORS 192.245 on:

- (a) The goals adopted in the five-year strategic plan and the progress made in implementing the plan;
- (b) Other changes in homelessness services, ordinances of member governments relating to homelessness and partnerships or programs established that are specifically related to member

government actions arising out of the agreement; and
(c) Identified challenges and opportunities relating to:

- (A) Regional coordination of homelessness services and planning;
- (B) Needs for technical assistance regarding program development or other programs from the Housing and Community Services Department; and
- (C) Addressing racial disparities through partnerships with culturally specific and responsive organizations serving populations overrepresented in experiencing homelessness, including Black, Indigenous, People of Color, federally recognized tribes and tribal members and outreach and engagement with these populations.

(5) In performing the Project tasks identified in this Exhibit A, the System shall coordinate with and develop partnerships with local and regional stakeholders, including, but not limited to:

- (a) Advocates for people experiencing homelessness and for people with lived experience of homelessness;
- (b) Community action agencies;
- (c) Housing authorities;
- (d) Affordable housing providers;
- (e) Behavioral health providers;
- (f) Law enforcement;
- (g) Educational agency liaisons for homeless children as described in 42 U.S.C. 11432;
- (h) Local Department of Human Services offices;
- (i) Courts;
- (j) Legal aid;
- (k) Coordinated care organizations, as described in ORS 414.572;
- (l) Emergency shelter providers;
- (m) Homeless service providers;
- (n) Organizations serving and advocating for veterans, homeless youth, youth exiting the foster care system, individuals exiting the criminal justice system, people with disabilities and aging adults, health care systems, domestic violence and sexual assault survivors, members of lesbian, gay, bisexual, transgender, queer or questioning (LGBTQ) communities, people experiencing behavioral health and substance use disorders, faith communities and business communities; and
- (o) The Housing and Community Services Department.

(6) In performing its duties under this section, the System shall coordinate with law enforcement, service providers and governing bodies to implement safe and humane processes to maintain public and environmental health and safety, balancing important individual and community rights.

(7) The System may use Grant funds in excess of those funds needed by the System to accomplish the requirements of the System under sections (1) to (6) of this Exhibit A to support the delivery of homeless services and shelter consistent with the five-year strategic plan, including through contracts with service providers.

EXHIBIT B

City of Umatilla
700 Sixth Street
Post Office Box 130
Umatilla, OR 97882

REQUEST FOR PROPOSALS Project PATH – Practical Assistance through Transitional Housing

Issuing office, point of contact, and location where copies of this Request for Proposals (RFP) may be obtained:

Dave Stockdale, City Manager
City of Umatilla
700 Sixth Street
Umatilla, OR 97882
(541) 922-3226
david@umatilla-city.org

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PART I – DESCRIPTION OF PROJECT

The City of Umatilla is engaging this Request for Proposals (RFP) to obtain submittals from qualified organizations to develop and implement Project PATH, a program designed to provide Practical Assistance through Transitional Housing (PATH). The intent of this program is to bring together various services to assist individuals and families facing homelessness with the objective to move them into and through transitional housing to permanent housing. An integral part of Project PATH will be the suite of services that will be available to participants within the Hermiston, Umatilla, Echo, and Stanfield (HUES) area. A major component of Project PATH will include a facility on property owned by Umatilla County within the City of Umatilla to create a safe space for overnight or longer stays with support services available onsite. The chosen organization will be the designated entity responsible for planning and delivering services for transitional housing and related support services to move an individual from homelessness to permanent housing. The selected contractor will be responsible for management of the Project PATH facility that includes a general building with offices, indoor common area(s), showers, and meal facilities; initially a minimum of 12 sleeping huts that can accommodate one to two people; and outdoor common areas in a secured fenced area. One entity is being sought to coordinate all services.

Project PATH is funded primarily through the Oregon Department of Administrative Services with funds from [House Bill 4123](#) (2022) and the City of Umatilla expects to subcontract with the selected provider for these services. The revenues allocated for these services shall be granted contingent on the availability of funds. The programs funded are contingent on an approved budget by the Oregon State Legislature and a fully executed Intergovernmental Agreement between the Oregon Department of Administrative Services and Umatilla County for the period ending June 30, 2024. Future funding is anticipated to come from a variety of sources including funding from the Contractor, funds obtained through various granting opportunities, general fund sources of the partner agencies, and other funding sources identified to support the variety of services that will be offered. All provider agreements shall be reviewed annually based on fund availability, continued need for the service, priority needs as established by the City of Umatilla, performance and evaluation reviews, and contract compliance.

The purpose of this RFP is to identify a contractor to provide a continuum of services to support entry into transitional housing and assist residents using various onsite and community services to move into permanent housing. These types of services shall include the following:

- Provide 24 hour, 7-day a week, onsite staffing to support the project building that includes offices, residents' showers, a food pantry, and the community kitchen. This includes managing the initial minimum of 12 housing units that will sleep at least one with some units able to sleep two residents.
- Educational Services including, but not limited to, coordination with residents to receive their high school diploma or GED, counseling services to connect residents with local or other traditional educational service providers (BMCC,

EOU, and others), and connecting residents with employer education services (such as CDL training, unemployment counselors, or workforce partnerships).

- Basic level medical, dental, and vision services.
- Transportation to work, educational programs, or other support services associated with Project PATH or deemed necessary for the resident's transition. Assistance is already identified through KAYAK and Umatilla Cab.
- Provision of, or connection to, services for persons with behavioral health conditions and/or substance use disorders.
- Care coordination and/or case management to support access to other needed services that may include education, training, and onsite or offsite work.

Project PATH will also provide Sleep Center Services for identified homeless individuals in addition to the residents on the Transitional Housing path. A primary purpose of this program offering is to replace the Hermiston Warming Station through use of a dedicated area for these temporary facility users. They will have physically separate sleeping quarters but will have access to some or most of the common or community areas (food pantry and showers as examples). This area of the facility is intended to be used as day-to-day or perhaps week-to-week when appropriate based on identified and agreed upon conditions. Users of these services will need to comply with the entire facilities operational rules but will also have a subset of rules especially for them. This will also be the section of the facility used by law enforcement to house individuals who may be illegally camping in right-of-way, along designated trails, or in parks.

The proponents of Project PATH are seeking a qualified Contractor that can demonstrate success or bring partners to the table that have proven experience in moving clients from crises situations to stability in homelessness or other situations that are similar. It is anticipated and expected that the selected Contractor will have experience and success in partnerships and collaborative situations with other service providers to achieve multiple outcomes in moving clients through program offerings with a demonstration of success. This history of proven success should allow a proposer to bring financial or other resources, either in cash or in-kind commitments, as a committed partner in delivering the Project PATH services.

It is anticipated that in year three of operations programmatic offerings would expand to include additional sleeping units, Veteran's services, assistance to family units, and basic childcare.

The City of Umatilla will require the provider to submit a quarterly report to the City Council and present at least annually a report before the City Council. The required content for the quarterly report will be developed by the City of Umatilla through consultation with the provider. A City of Umatilla representative will be allowed to attend, for informational purposes, regular meetings of provider's governing board.

Any public or private agency, organization or individual with service providers who hold all licenses, certificates, authorizations, and other approvals required by law to deliver services is eligible to submit a proposal. All entities submitting Proposals are

referred to as Proposers in this RFP; after execution of the Contract, the awarded Proposer will be designated as Contractor or Provider.

1. General Information

To be considered an eligible response the proposal must be submitted by mail, courier, or email no later than 4:00 p.m., on July 7, 2022, to the Umatilla City Hall, 700 Sixth Street, Umatilla, OR 97882 or to david@umatilla-city.org. The submittal shall identify the contents as "Proposal for Project PATH" either on the envelope or in the subject line of the email.

All proposals received will be evaluated by a committee made up of representatives from Umatilla County and the Cities of Umatilla, Hermiston, Echo, and Stanfield. The evaluation committee will make a recommendation as to which firm should be selected. After receipt of the selection committee's recommendation, the City of Umatilla will make its final decision.

2. Schedule of Activities

RFP Released	June 3, 2022	
Bidder's Conference (Optional) (In person and Zoom)	June 15, 2022	11 am PDT
Deadline for Submission of Questions or Written Comments on or Protesting Specification Believed to Limit Competition	June 20, 2022	5 pm PDT
Deadline for proposal submission	July 7, 2022	4 pm PDT
Notification of Review E-mailed	July 14, 2022	
Deadline for Submission of Written Protests of Recommendations	July 21, 2022	5 pm PDT
Award of Contract	August 2, 2022	7 pm PDT
Anticipated Start of Services	August 8, 2022	

It is anticipated that an optional On-Site Presentation may be requested of the top organizations to be done in-person with the Selection Committee to gain a better understanding of the qualifications. This is anticipated to occur the week of July 8 through 13.

Proposals received after the date and hour specified above will not be accepted under any circumstances and will be returned to the Proposer unopened. Proposals must be submitted by mail, courier, email, or in person. Proposals submitted by facsimile transmission will not be accepted.

3. Incurred Costs

The City of Umatilla will not be responsible for any cost incurred by prospective firms in preparing or submitting their proposals.

4. Evaluation Criteria

Awarding of a contract will be based upon a qualifications-based selection procedure. The following evaluation criteria will be used to evaluate proposals:

Evaluation Criteria	Possible Points
All required components are present in the proposal	Pass/Fail
Service Delivery Components	
Qualifications of the Proposer relative to the requirements outlined in the RFP and examples of relevant experience with delivering required services	25
Approach to delivering required services	20
Plan for delivering services that offer quality and value to the service area	15
Approach to delivery of services beyond the required services and the transition for the services to be added in Year 3	20
Demonstration of Ability	
Proposal to provide innovative and/or value-added services	10
Demonstrate recent experience providing these specific services	15
Ability to begin service delivery upon projected start date	10
Costs and Resources	
Evidence of financial and administrative stability	10
Evidence of experience in and ability to obtain additional financial resources or in-kind services to Project PATH	10
Bring significant financial resources, cash or in-kind, as a committed partner	25
Willingness to negotiate contract terms	15
Cost of Service Delivery	15
Partnerships	
Demonstrates a commitment to collaborate, or partner, with other service providers	10
Total Points	200

5. Instructions to Proposers

- A. **General.** Respondents must submit a complete and concise response to this RFP. Proposals must include a statement as to the period the proposal remains valid. All proposals received in response to this RFP will be retained by the City of Umatilla. Proposals should provide complete details concerning the Proposer's ability to meet the requirements of this RFP. The City of Umatilla reserves the right to waive informalities and minor irregularities in proposals, to reject all proposals, and to select the most responsive proposal that best meets the needs of the citizens of the City of Umatilla and the west end of Umatilla County.
- B. **Proposals.** All proposals shall be typed and comply in every manner with the requirements of this solicitation. Each proposal must be signed in ink. If the proposal is made by a firm or partnership, the name and address of the firm or partnership shall be shown, together with the names and addresses of the members. If the proposal is made by a corporation, it must be signed in the name

of such corporation by a person that is authorized to bind the Proposer and who shall also affix the corporate seal of such corporation. Proposals must contain the name, title, address, email, and telephone number of an individual or individuals with authority to bind the Proposer(s) during the period of validity of the proposal. Advertising brochures and generic specifications that are included with a proposal will not be an alternative to specific response to the RFP requirements.

C. **Withdrawal of Proposals.** Proposals may be withdrawn, by written or telegraphic request received from the Proposer, prior to the time fixed for opening. Negligence on the part of the Proposer in preparing the proposal confers no right for the withdrawal of the proposal after it has been opened. The proposal will be irrevocable until such time as City of Umatilla:

- i. Specifically rejects the proposal or
- ii. Awards a contract and said contract is properly executed.

Proposals must be valid for at least one-hundred-twenty (120) days. The Proposer agrees to furnish the services as specified to the City of Umatilla at the prices and with the warranties/guarantees represented for that period.

D. **Modifications.** Any Proposer may modify their proposal by sealed written registered communication at any time prior to the scheduled closing time for receipt of proposals, provided such communication is received prior to the closing time.

E. **Acceptance or Rejection of Proposals.** The City of Umatilla will accept the proposal which, in its estimation, will best serve the interests of the City of Umatilla and the west end of Umatilla County, and reserves the right to award a contract that shall be best for the public good. The City of Umatilla reserves the right to accept or reject any or all proposals received as the result of this RFP, to negotiate with all qualified sources, and/or cancel all or part of this RFP at any time. Until such time as a contract is executed with the successful bidder, the City of Umatilla may cancel all or any part of this RFP. This RFP does not commit the City of Umatilla to pay any costs incurred in the preparation and submission of proposals. Without limiting the generality of the foregoing, any proposal which is late, incomplete, obscure, or irregular may be rejected; any proposal having erasures or corrections in the proposal may be rejected; any proposal accompanied with an insufficient or irregular proposal guarantee may be rejected. Any evidence of collusion between Proposers may constitute a cause for rejection of any proposals so affected.

F. **Interpretations.** No oral interpretations shall be made to any Proposer as to the meaning of any of the proposal documents. Every request for an interpretation shall be made in writing and addressed to the City Manager. All such interpretations and addenda will be sent to all prospective Proposers. Failure of any Proposer to receive any such addendum or interpretation shall not relieve

such Proposer from any obligation under its proposal as submitted. All addenda so issued shall become as much a part of this request for proposal document as if bound herein.

- G. **Nondiscrimination.** The successful Proposer agrees that in performing the work called for by this proposal and in securing and supplying materials, Proposer will not discriminate against any person on the basis of race, color, religion, creed, political ideas, sex, age, marital status, physical or mental handicap, national origin, or ancestry unless the reasonable demands of employment are such that they cannot be met by a person with a particular physical or mental handicap.
- H. **Failure to Submit Offer.** If no offer is to be submitted, do not return the RFP. Failure of the recipient to offer, or to notify the issuing office that future solicitations are desired, will not result in removal of the name of such recipient from the mailing list for the type of services covered by this solicitation.
- I. **Preparation of Proposals.** Proposers are expected to examine the specifications, schedule, and all instructions.

The selected proposal shall be incorporated by reference, with modification as agreed to by the City of Umatilla, into the final contract and shall be binding upon the successful bidder.

Proposers further agree to the following:

- i. To examine all specifications and conditions thoroughly.
- ii. To comply with all Federal, State, County, and City laws, ordinances, and rules.
- iii. To the extent allowed by law, to accept any claims, liens, and demands, and to indemnify and hold harmless the City of Umatilla.

6. Protests

Any protests under this RFP shall follow the protest procedures set forth in OAR Chapter 137 Division 46 or Division 47 as appropriate.

7. Oregon Public Contracts

All contracts with the City of Umatilla are governed by Oregon public contract and purchasing law as specified in Oregon Revised Statutes Chapter 279 and its related Chapters.

PART II - PROGRAM INFORMATION

8. Scope of Work/Services

This section outlines the role of the Contractor, the City of Umatilla, and other stakeholders in delivering on the City of Umatilla and its partners goals for the contracted Project PATH services and outlines the various activities and services the Contractor is expected to provide.

Project PATH seeks to address emerging law and case law while supporting the homeless community from homelessness through transitional housing to permanent housing. In 2021 the Oregon Legislature passed [House Bill 3115](#) which provides that local law regulating sitting, lying, sleeping, or keeping warm and dry outdoors on public property that is open to the public must be objectively reasonable as to time, place and manner with regards to persons experiencing homelessness. This is envisioned to be accomplished at the Project PATH facility within the City of Umatilla and serve west Umatilla County. Services will include those listed earlier in this RFP and can include other services if proposed.

9. Contractor Description/Objectives

The City of Umatilla is seeking a Contractor who is innovative and capable of ensuring high quality services and who can demonstrate the ability to meet specific requirements necessary for compliance with delivery of required services. A single entity is sought that can provide all the requested services.

Minimum Requirements:

The following are requirements for the Contractor. The respondent must demonstrate current ability to meet these requirements. If an awarded Contractor cannot meet these requirements, the City of Umatilla has the right to award a new Contractor:

1. The Contractor shall demonstrate existing relationships with providers in the service area to meet the program objectives of Project PATH.
2. The Contractor shall demonstrate the ability to establish a set of organizational policies and facility code of conduct that will advance the success of both staff and residents at Project PATH.
3. The Contractor shall demonstrate the ability to provide basic level medical, dental, and vision services to the recipients of services through Project PATH. This would include the delivery of emergency services, including CPR/First Aid at the Project PATH facility.
4. The Contractor shall demonstrate the ability to coordinate educational services for resident success.
5. The Contractor shall demonstrate the ability to operate required Sleep Center Services.
6. The Contractor shall demonstrate the ability to provide services in a safe and

- secure environment that would limit police intervention at the Project PATH facility.
7. The Contractor shall demonstrate the ability to maintain a facility that is free of drug and alcohol.
 8. The Contractor shall demonstrate the ability to coordinate with and facilitate Project PATH participants obtaining Crisis Stabilization and Substance Use services as needed.
 9. The Contractor shall identify a Program Director.
 10. The Contractor can identify other service offerings.

10. Optional Services/Activities

In addition to the required services, Respondents may recognize community needs that can be met by providing additional value-added services to be identified within the Proposal.

11. Program Performance Requirements

The expenditure of Project PATH funds must result in delivery of services to individuals seeking to move from homelessness through transitional housing to permanent housing.

Program performance and client service outcomes will be monitored. All programs will be required to maintain service standards set by the City of Umatilla with input from stakeholders and partners. If the program's service performance falls below that standard for a three-month period, a corrective action plan will be instituted. If the performance standard does not improve to meet the identified standard within three months following institution of the corrective action plan, the number of individuals and funding may be reduced and/or terminated.

Contract reporting requirements include program reporting requirements, an agency annual audit, quarterly management reports consisting of board of director's meeting minutes (where applicable) and financial, utilization, and performance reports as well as any other incidental reports as requested by the City of Umatilla.

Funding and Contract Period

Initial funding for Project PATH is paid through an Intergovernmental Agreement with the Oregon Department of Administrative Services and Umatilla County.

The contract period will be from start up through June 30, 2024, with five one-year extensions possible based upon contractor performance and availability of funding. Extensions are dependent upon success of the Contractor and available funding. Funding is expected from the partners and the Contractor.

In year three additional services will be required to include coordination and delivery of services to Veterans, family-based services, and childcare delivery.

Administrative and Fiscal Management

Contractor is responsible for assuring that all required core administrative functions, and service delivery operations, are conducted efficiently, effectively, and in compliance with all relevant laws, rules, and regulations. Contractor is also responsible for assuring that all City of Umatilla funding streams for services are braided for maximum leverage to support service delivery while assuring that fiscal accounting methods support accountability for use of funds. Braided funding consists of multiple funding streams brought together to pay for more services than any one stream can support and are tracked separately to report to funders. Contractor shall be responsible for identifying, managing, and reporting in a systematic manner to the City of Umatilla individual funding streams supporting Project PATH services. Funding streams other than initial Project PATH funding could include dollars from Medicaid, Medicare, State/Block Grant, insurance, grants, and partner funds.

Proposers shall identify within the response to the RFP two cost structures. The first, identified as Administrative Development, will address anticipated start up and administrative work that would include the drafting of Standard Operating Procedures (SOPs) and other operational guidance or policy manuals, necessary managerial and fiscal plans, partnership agreements (as appropriate), and any work at the Project PATH site needed prior to opening.

The second cost structure would address Service Operations outlining anticipated operations costs designed as a monthly flat rate for facility operations. In addition to regular operations this should also address anticipated costs for Sleep Center Services.

Quality Performance Management and Accountability

The City of Umatilla and its partners are interested in establishing a quality and performance data set and process to drive, monitor, and evaluate positive outcomes for persons receiving Project PATH services under the provisions of an eventual contract. The Contractor selected will be required to systematically report on established performance measures to the City of Umatilla. The City of Umatilla will work with the Contractor to establish a collaborative data development process, in which the Contractor will play a prominent role, based on consensus agreement on and documentation of, specific uses for sharing data, identifying the minimum types and amounts of data needed to achieve the established purpose, providing ongoing opportunities to inform individuals and the public about how their data are being used, and building privacy, security, and civil liberty protections into the design of the data sharing systems.

The Contractor will provide input into development of the framework for ongoing data collection to support clear actionable milestones, data-sharing, and data-driven process improvement. This data and performance evaluation process is critical to support the City of Umatilla's responsibility to community members to provide validated data to prove the efficacy and impact of the community's investment in Project PATH's services. The City of Umatilla will audit and ensure quality and accountability of the Contractor.

Data Management

It is essential that the Contractor demonstrate electronic data sharing capabilities, considering relevant privacy and security rules and regulations, to support streamlined coordination of services and rigorous outcomes tracking. Contractor will be required to share within legal processes and parameters client information with subcontractors and community partners to coordinate care, monitor outcomes, and produce required reports. Data should be tracked and uses with no greater than a 10 percent error rate.

Additional Program Information

If applicants need additional information about any aspect of the program, questions and requests for information should be addressed to Dave Stockdale. Requested information to the extent it is available, will be provided to any applicant.

PART III – PROPOSAL CONTENT

REQUIRED DOCUMENTATION

All responses to the RFP must include all items requested. Proposals which are incomplete or fail to include all items will be rejected. Responses should follow the sequence of questions or documentation requested in all sections of the RFP.

1. (5 pages) Describe your agency's experience in:
 - a. Providing services to the homeless.
 - b. Collaboration with related or beneficial Programs and Initiatives.
 - c. Meeting program requirements. State the types of service and the status and history of each.
 - d. Providing services in rural areas.

Responses should acknowledge and address the Service Delivery Components and Demonstration of Ability items found in the Evaluation Criteria earlier in this RFP.

2. (3 pages) Describe how your agency will address access issues, i.e., who will be served, in what order or priority, and what will happen when services are at capacity. If your agency has developed a policy which addresses these issues, please include it in response to this item.
3. (2 pages) Describe the cultural and language proficiencies of your agency's program staff and your recruitment practices to support and retain staff. Discuss strategies used to ensure that clients using a language other than English will be able to access services, starting with the first point of contact. Include a description of how and when interpreter services are utilized.
 - a. Discuss the most commonly presenting non-majority clients served by your agency and important cultural considerations in service planning and delivery.
 - b. Discuss how your organization will ensure access and service delivery in a culturally appropriate manner to any individual requesting service regardless of the language spoken.
4. (5 pages) Provide an overview of your proposed services, including capacity for number served and areas of expertise recognizing that the Project PATH facility will initially be designed with a minimum of 12 sleeping units. Also address how your agency would scale services when additional sleeping units are added or other mechanisms to grow the Project PATH facility are introduced. Include how services will be scaled in year three to add services for Veteran's, family units, and to provide childcare services.

5. (1 page) Describe how your services will utilize the information contained in the 2021 Umatilla County Community Health Assessment (CHA).
<https://ucohealth.net/community-health-assessment-2021-2022>
6. (4 pages) Provide your anticipated budget for years 1 and 2 to reflect the cost-of-service delivery relative to the stated services to be delivered. Also include how the addition of services in year three will impact the cost-of-service delivery for Project PATH.
7. (1 page) Describe the strategies your agency uses for cost containment including the ratio of direct to non-direct or administrative costs. Submit the findings of the last three fiscal audits of your agency (will not count toward page total). Please ensure that the date of the audits is clearly indicated. If your organization has not completed three fiscal audits, please provide available audits, available internal financial reports, and the name of your auditing firm.
8. (3 Pages) Describe how your organization will meet the staffing requirements to provide 24-hour coverage to create a safe and secure environment at the Project PATH facility. Provide resume or curriculum vitae for leadership team (will not count toward page total) and a proposed organizational chart of the Project PATH team. If you are planning to hire staff upon award of contract, describe how you will be able to meet the contract requirements from the contract start date.
9. (Pages as necessary) Provide appropriate Oregon license(s) and/or certification(s) necessary to perform services identified in the RFP including proof of State of Oregon Business Licensure or indicate ability to obtain such licensure.
10. (Pages as necessary) Provide proof of insurance or information concerning the ability to obtain insurance protective to the City of Umatilla prior to the start of the contract period to be no less than required under the Oregon Tort Claims Act or \$4,000,000.00, whichever is greater.

PART IV PROPOSER'S STATEMENTS AND CERTIFICATIONS

Proposer's Name: _____

PROPOSER'S STATEMENTS

Proposer offers to provide the required services in accordance with the requirements of the RFP stated above and the enclosed proposal. The undersigned Proposer declares that the Proposer has carefully examined the above-named Request for Proposals, and that, if this proposal is accepted, Proposer will execute a contract with the City of Umatilla to furnish the services of the proposal submitted with this form. Proposer attests that the information provided is true and accurate to the best of the personal knowledge of the person signing this proposal, and that the person signing has the authority to represent the individual or organization in whose name this proposal is submitted.

By execution of this Form, the undersigned Proposer accepts all terms and conditions of this RFP except as modified in writing in its proposal. Proposer agrees that the offer made in this proposal will remain irrevocable for a period of sixty (60) days from the date proposals are due.

By execution of this Form, the undersigned Proposer acknowledges that its entire proposal is subject to Oregon Public Records Law (ORS 192.410–192.505) and may be disclosed in its entirety to any person or organization making a records request, except for such information as may be exempt from disclosure under the law. Proposer agrees that all information included in this proposal that is claimed to be exempt from disclosure has been clearly identified either in the Proposer's Statement, or in an itemization attached hereto. Proposer further acknowledges its responsibility to defend and indemnify the City of Umatilla for any costs associated with establishing a claimed exemption.

ADDENDA

Proposer has received and considered, in the enclosed proposal, the terms of any addenda.

CERTIFICATIONS

By signing this Proposer's Certification form, Proposer certifies that:

1. Proposer is is not (check one) a resident bidder, as defined in ORS 279A.120.
2. Proposer has not discriminated and will not discriminate against a subcontractor in awarding a subcontract because the subcontractor is a minority, women, or emerging small business enterprises certified under ORS 200.055 or a business enterprise that is owned or controlled by or that employs a disabled veteran, as defined in ORS 408.225.

3. This proposal is made without connection or agreement with any individual, firm, partnership, corporation, or other entity making a proposal for the same services and is in all respects fair and free from collusion or collaboration with any other Proposer.
4. Proposer has, to the best of Proposer's knowledge, complied with Oregon tax laws in the period prior to the submission of this proposal, including:
 - a. All tax laws of the State of Oregon, including but not limited to ORS 305.620 and ORS chapters 316, 317, and 318,
 - b. Any tax provisions imposed by a political subdivision of this state that applied to Proposer or its property, goods, services, operations, receipts, income, performance of or compensation for any work performed, and
 - c. Any rules, regulations, charter provisions, or ordinances that implemented or enforced any of the foregoing tax laws or provisions.

The undersigned, by signature here, acknowledges, accepts, and certifies to the Proposer's Statements and Certifications as stated above.

PROPOSER

Authorized signature	Proposer's agency or business name
Name of authorized signer	Address
Title	
Date	Federal Tax ID Number

EXHIBIT C



**RESPONSE TO REQUEST FOR PROPOSALS
Project PATH – Practical Assistance through Transitional Housing**

July 7, 2022

Submitted to:

**Dave Stockdale, City Manager
City of Umatilla
Umatilla City Hall
700 Sixth Street
Umatilla, OR 97882
(541) 922-3226
david@umatilla-city.org**

Submitted by:

**Stepping Stones of Hermiston Inc.
P.O. Box 395
Hermiston, OR 97838**

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NOTE: * Red asterisks within the body of text are included to support identification of information which is directly relevant to RFP Evaluation Criteria; however, relevant information may also be found in other places.

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RESPONSE - REQUIRED DOCUMENTATION

1. (5 pages) - Describe your agency's experience in:
 - a. Providing services to the homeless.

QUALIFICATIONS – Qualified by Preparation

Stepping Stones Alliance, previously known as Stepping Stones of Hermiston, Inc., was registered as a Domestic Nonprofit Corporation (DNP) entity in the State of Oregon in February of 2020. However, the journey of Stepping Stones began the year prior with the experience of a devoted volunteer at the Hermiston Warming Station.

It began for that individual with the satisfaction of seeing the positive impact on others of a safe, secure shelter during cold winter months, which led to the realization that for a larger portion of the year no such resource was available. Whatever the weather, cold or hot or wet or windy, the lack of shelter from the elements and any assurance of personal safety became a concern that couldn't be disregarded.

In June of 2019, a visit was made to Walla Walla, Washington where a Sleep Center is available 365 nights/year and provides small individual housing units (Conestoga Huts) for their guests. The site was extremely neat and clean and the guests expressed pride in having their own housing unit. The Conestoga huts cost \$1200 to build. **With this visit the dream of providing safe year-round shelter for individuals in West Umatilla County was born and the work started.** (Go to www.steppingstonesalliance.net)

What began as a small group of individuals, has expanded to a complete board of directors of a non-profit organization. Board members visited and researched a large variety of existing programs and communicated with their founders: Walla Walla Sleep Center, Watered Garden (Joplin, Missouri), City of Refuge (Atlanta, Georgia), Bybee Lakes Hope Center (Portland Oregon), Other Side Academy (Salt Lake City, Utah), The Church in the Park (Salem, Oregon), Community First (Austin, Texas) and Hope Community (Vancouver, WA).

As the dream expanded beyond the city of Hermiston a new name was adopted, Stepping Stones Alliance. Some of those original board members are still active today. **Knowledge about what works and what doesn't work*** in various settings has been gathered during the above-mentioned site visits. Stepping Stones embraces the mantra "don't reinvent the wheel". There is a camaraderie and willingness to share among providers. The Walla Walla Alliance has shared their entire Policy and Procedure manual which reflects their experience over the past 8 years.

Stepping Stones' board members are **qualified by years of relevant experience.*** Their experiences range from Executive Director and General Manager to providers of direct support to people in many special populations, including the homeless, to budget management and Warming Station volunteer, among others. The Stepping Stones Board and staff bring knowledge, skills and experience to the table. The individuals on Stepping Stones board have, even within the past several years, proven their skills and commitment to quality work through conversations, action and information provided to public entities in western Umatilla County. A **detailed composite of Board member and planning staff' relevant experience** is presented in this Response under the title, **Qualifications Vitae Stepping Stones Leadership Team** ([see Item 8 Staffing, p.33](#)) We invite your review of the Vitae and will summarize below the primary experience and strengths each individual brings to the work:

Cathy Lloyd – Board Chair and President, Energetic and experienced leader, Impassioned initiator of the Stepping Stones vision; director of community groups; professional experience assisting some of the most vulnerable populations of adults and children, including the homeless

Michael Atkinson – Board Treasurer, Successful entrepreneurial businessman; member of the original group of Stepping Stones supporters and the Board and still making things happen **Chuck Barnes** – Board Vice Chair, Builder/designer and Executive Director of hospitals and overseer of strategic planning and hospital delivery of support services; compassionate; life-long service toward the betterment of people.

Sandy Francis – Former Chair Hermiston Warming Station Chair, Vice Chair and volunteer; survivor of negative childhood foster care system experience and homelessness

Brandy Medrano – Board Secretary, Currently working in service delivery assistant role for Eastern Oregon veterans; personal childhood and youth experience with unstable housing,

parenthood, low income, domestic violence

Steve Eldrige – Innovative, highly experienced, executive level leader of large utility entity; committed board member for Stepping Stones and numerous other civic and human service organizations

Roger Condie – Experienced operations manager of homeless shelters, program developer and substance abuse counselor; current Housing Authority leadership role and named Interim Director of this PATH project.

Kris Barnum – Stepping Stones Project Planner, Education program developer, manager, teacher, advisor/success coach of customized training programs for special populations; Utilized collaborative partnerships across business, higher ed, K-12 and social services to build programs that offered “second chances” to displaced, disengaged or low-income individuals

Stepping Stones is ready now to move this project forward, building on past accomplishments and on several meaningful and recent experiences delivering services:

Service delivery experience is demonstrated by the successful, quick startup of the Hermiston Day Shelter during the month of January 2022. * When an extreme cold settled in over New Years, Board members recognized the critical need to provide a daytime shelter. The Day Shelter response was conceived, organized and opened within a 24-hour period thanks to countless volunteer hours by community members who were rallied, organized and coordinated by Stepping Stones. During its one month of operation, the Day Shelter served 24 unduplicated individuals. Many came more than one day, resulting in 76 full or partial days of shelter experienced by individuals. Additionally, Stepping Stones board members and staff facilitated connections from the Shelter which resulted in delivery of resources or services from CAPECO’s (Out of the Cold) program for hotel vouchers, to Outreach staff from Support Services to Veterans Families, and COPEs peer counselors. Information was communicated to Desert Rose Ministries. that enabled them to assist an individual to enroll in a long-term drug rehabilitation program.

Readiness to begin service delivery is yet another qualification of Stepping Stones. Relative to the needs of the Sleep Center and as a result of our proactive partnership and support of the Hermiston Warming Station (HWS) operation, the full inventory of the HWS was transferred to Stepping Stones when HWS closed their site. These many resources, including but not limited to bedding, pillows, toiletries, hats, gloves, socks, cleaning products, and kitchenware are in our possession and in local storage.

Another element of our relationship with HWS gives evidence of experience* providing services to the homeless. In order to assure overnight staffing at HWS and thus the ability to be open, Stepping Stones investigated security providers, independently hired, provided training and paid part-time staff through funding from the Stepping Stones budget and a generous sponsorship that Stepping Stones solicited from AWS.

Stepping Stones Alliance leaders are impressively qualified to assume leadership of the PATH Project. These qualifications include their relevant knowledge, relevant experience, demonstrated commitment and skills in providing services to the homeless and engaging community partners in the task ahead.

b. Collaboration with related or beneficial Programs and Initiatives.

COLLABORATION

Stepping Stones’ approach to delivering required services will be through collaboration*. Collaboration means more than just communicating accurate, timely information and more than just coordinating schedules. It means working *together*. It means people, in this case groups of people, working together *toward a common goal*. It requires a level of sharing and integration, and likely some compromise, that brings those involved to not only achievement of their common goal but to deeper relationships and trust.

The objectives and sustainability of Project PATH and Stepping Stones can be accomplished through no other approach. The individuals we will serve deserve no less, especially because collaborative relationships of trust are what they need to see and experience so they can believe and take action toward their own changed future.

Project PATH’s required services are currently being offered in west Umatilla County. However, among the challenges/barriers faced by those experiencing homelessness is transportation to make a connection with those providers. The Navigation Center will be that physical connection point whenever possible.

Facilitating understanding and gaining the support of those same service providers has been the goal of Stepping Stones outreach over the past several years. Information about Stepping Stones' vision and three-phase plan has been shared through emails, Zoom calls and face-to-face meetings and 1:1 conversation. As a result, our name and commitment to collaborative partnership is already known among providers across the region.

Our plan to provide a broad holistic range of supports and services, within a "Housing First" model, has also been made known. Reactions to this model have consistently been supportive, often enthusiastic! The names of those offering Required Services, who have responded with willingness to "come to the table", supported either by letter or verbally, are included along with the date of contact and response type in the Organizational Chart – Service Delivery Partners (see Item 8, p.37) Letters of support are included in Item 9, p.41-44)

See the following list of RFP-named, required service partners, additional value-added providers, along with the names of other entities with whom Stepping Stones has made contact:

REQUIRED SERVICE PROVIDERS: (see RFP p.3-4)

Educational Services	Blue Mountain Community College, HHS
Basic medical, dental, vision services	Contacts have been made with providers in each area. The level of commitment at this point varies. Moving all of them forward will be supported by official award of this Contract.
Transportation	Kayak, Umatilla Cab – per UCo contract; EOCCO's facilitated transportation system for OHP members is robust
Behavioral health or substance use disorders	Community Counseling Solutions
Care coordination/case management to support access to other needed services	DHS WorkSource COPES

VALUE ADDED - SERVICE PROVIDERS: direct contacts made

Services to veterans	Veteran's Services (VSO's) Umatilla and Morrow County
Transitional housing for parents	Martha's House
Fair housing info. and enforcement	Fair Housing Council of Oregon
Support services to veterans' families	SSVF – within BMAC
Transitional housing support resources	CAPECO
Outreach and referrals	Desert Rose Ministries
Domestic violence services	Domestic Violence Services (Hermiston)
Subsidized Permanent housing options	Umatilla Housing Authority

OTHER IMPORTANT COMMUNITY PARTNERS: direct contacts made

Law enforcement support & response as needed	Hermiston and Umatilla Police Departments
Relationships with area faith-based groups	Hermiston Faith-based Advisory Committee
Understanding of community needs	Hermiston Hispanic Advisory Committee
Civic outreach – vision support services	Rotary, Kiwanis, Altrusa
Potential broader transportation services	Morrow County Transportation Coordinator
Sponsorships – additional/future	Amazon Web Services, Fair Housing Council of Oregon, Good Shepherd Community Health Foundation

Stepping Stones representatives are participating regularly in existing groups convened around housing support. These groups include the Home 4 Hope consortium, EO Community Action Group (CAG) run by Fair Housing Council of Oregon, Morrow County Roundtable (hosted by Veterans Services), the Umatilla County committee for mental health ROCK'T, and the Mental and Behavioral Health and Homeless Subgroups for the Umatilla County Community Health Improvement Plan*.

Stepping Stones will ensure quality and value of service delivery* through hosting regular

meetings of service providers. We will invite all partners and potential partners to the table in an initial, long-planned and COVID-delayed convening prior to the end of 2022. This meeting early-on in operations will ensure and enhance currency in point of contact lists, clarify service delivery/customer service approach expectations and common understanding of policy and processes. In ensuing years, this annual event will provide for new updates to partners, to the community and support fund-raising. Regular monthly meetings of key PATH required service provider partners will likely become a staple of positive, collaborative relationships.

C. Meeting program requirements. State the types of service and the status and history of each

PROGRAM REQUIREMENTS

1. Demonstration of existing relationships with providers.

In addition to the information included in the tables in “b.” above, existing relationships are named within the Organization Chart- Service Delivery Partners found on [p 37](#) of this Response. The organization chart titled “Service Delivery Partners” reflects the names and dates and descriptions of partnership statuses as of the date of submission of this RFP. Letters of support are also included, attached within [Items 9, p 41](#)

2. Demonstrate ability to establish organizational policies and code of conduct.

Stepping Stones board has already ventured into the development of policies and procedures based on those previously used at the Hermiston Warming Station and currently used at Walla Walla Alliance for the Homeless. This work is reflected in the *Sleep Center Welcome and Agreement*, a draft document found in [\(Item 9, p.45\)](#). Some policy and procedure work has been started for the Navigation and Housing Centers. A sample is included: *Community Member Action Plan/Goals* [\(Item 9, p.53\)](#). **Stepping Stones ability in this requirement is further demonstrated** by the various documents and procedures created and effectively utilized at the winter Day Shelter which Stepping Stones, along with community members, set up and operated during the month of January 2022. *Day Shelter-Guest Expectations* [\(Item 9, p. 52\)](#) is a sample of one of one of several policy and procedure documents developed and used in the Day Shelter.

3. Demonstrate ability to provide basic level medical, dental and vision services.

Initial contacts have been made with providers since release of the RFP. Stepping Stones’ plan had been to initiate these services at some point after initial startup, allowing time and experience to inform level of demand and information given to providers. These partnerships are represented on the Organizational Chart – Service Providers, found in [Item 8, p.37](#). Stepping Stones will assist Members in becoming aware of these options, making contact with necessary providers, scheduling appointments, and coordinate necessary transportation to those services. Assistance will also be given to help members apply for Oregon Health Insurance and to utilize EOCCO’s coordinated medical transportation and other services.

4. Demonstrate ability to coordinate educational services.

A recent letter of support verifies the enthusiastic support of BMCC. Dean Tammy Krawczyk oversees college programs which support completion of high school diploma or GED as well as CTE programs which offer funding for marketable skills training (forklift; CDL, etc.). BMCC has a STEPS Navigator, a program which has the ability to assist with expenses for low income and first-time students. Stepping Stones’ Project Planner has work history as a Success Coach at BMCC within the last few years so relationships are established. In addition, WorkSource has also provided a letter of support and we anticipate that through their extensive employer relationships, workforce training funds and/or the STEP program, WorkSource will assist Stepping Stones members. These letters of support are found within [Item 9, p. 42-43](#)). Contact with HHS principal Tom Spoo has been made and anyone age 18 or under will be given the opportunity to engage in the high school’s well-developed GED program.

5. Demonstrate ability to operate Sleep Center Services.

Extensive information and experience have been gleaned from Hermiston Warming Station, board member volunteer experience and Stepping Stones collaborative partnership with HWS during the winter 2021-22 season and prior. Stepping Stones is well prepared to operate the Sleep Center. Many supplies and materials are in-hand, obtained from the Warming Station at their closing. A Sleep Center Welcome and Guest Agreement has been drafted based on Walla Walla Alliances’ manual and HWS’ [\(Item 9, p.45\)](#). Contacts with local churches and community members indicate that volunteers will be forthcoming. Learning from the challenges faced by

HWS, Stepping Stones has developed strategies to better ensure regular, reliable scheduled volunteers. Research and costs have been determined for storage bins, which will provide Sleep Center guests with the option of leaving their belongings in a secured area during the day. This will allow for job interviews and other professional or private contacts to be accomplished without the obvious burden of carrying personal belongings, providing a higher potential for success.

6. Demonstrated ability to provide services in a safe and secure environment.

A quote has been obtained for exterior site security including lights and cameras. An interior security video monitors and system, and emergency call button, used at HWS was passed on to Stepping Stones. (See site layout plan, Item 4, p.14) * Trained Night Staff are part of the Staffing plan. These paid, trained staff members will be on site 24/7. (See Org. Chart-Site Operations, p.38) schedule detail.) Night staff will be trained to perform checks of Sleep Center guest's belongings upon entrance, securing legal but not allowed items, confiscating illegal items, keeping law enforcement intervention at a minimum but notifying when necessary. Night Staff will be trained at the appropriate level, to uphold all laws and board approved Stepping Stones Alliance policy and procedures. All staff and volunteers will also be trained in First Aid/CPR, de-escalation techniques and how to connect with Crisis Stabilization and Substance Use services when needed.

7. Demonstrate ability to maintain a facility that is free of drug and alcohol.

As described in Item 6 above, policy and procedures will be established which set rules around drugs and alcohol on site. Both Sleep Center and Housing Center policy will address these issues with strength-based Expectations, rather than punitively crafted rules. We recognize that drug and alcohol use among the homeless is prevalent and that word choice and consistent application of clear policies and procedures can serve to build a community of trust without lowering expectations, particularly among Housing Center members. There will be rules and consequences for not following them detailed in policy and procedures.

8. Demonstrate ability to coordinate with and facilitate response needed Crisis

Stabilization and Substance Use services. As mentioned in #6 (above), information and training for crisis situations will be provided to staff, particularly to Security. This training will be reviewed and rehearsed so that it is actionable by all who may need to utilize it. Community Counseling Solutions has verbally indicated a willingness to provide this training and has provided a general letter of support. (Item 9, p.41)

9. Identify a Program Director. This position will be posted as soon as possible after award of Contract so that a permanent, highly qualified individual can be identified. In the Interim, Roger Condie, MSW, Stepping Stones Alliance board member and experienced manager of programs providing services to the homeless, has agreed to serve in the role of Interim Program Director.

10. Contractor can identify other service offerings. A variety are planned. (See Item 4, p.13.)

d. Providing services in rural areas.

It was recognized early on that rural Eastern Oregon was different from large cities and unique from even other rural areas. It was also recognized that some individuals simply want a safe place to sleep at night, while others long to find their way toward housing of their own but face obstacles such as skill and resource gaps, and a mindset of flickering hope. Stepping Stones wishes to be there for each of those individuals.

All of the operating programs visited have been in large urban areas: Austin, Texas; Salt Lake City Utah, Portland Oregon, Salem Oregon, Vancouver Washington, Joplin Missouri and Atlanta Georgia. Even Walla Walla Washington at 33,000 is considerably larger than the cities of West Umatilla County. These larger population areas have multiple services available to individuals with a variety of public transport that allows people ready access. Rural Oregon has miles to go between services. Therefore, it is necessary to bring the services to the people.

The Navigation Center of Stepping Stones is meant to be a 'one stop shop' where those in need will be able to get the necessary information about what is available, where to find it and support in accessing it. Most of those services, provided through partners, will be onsite in-person or accessible onsite through technology. Transportation options will be available and arranged when needed.

For rural areas, it is essential to have everything 'under one roof' and to assist people in availing themselves of those services. The collaborative partnership model that Stepping Stones has broadly shared over the last two years will support the 'one stop shop' becoming a reality.

2. **(3 pages) Describe how your agency will address access issues, i.e., who will be served, in what order or priority, and what will happen when services are at capacity. If your agency has developed a policy which addresses these issues, please include it in response to this item.**

ACCESS

The Stepping Stones Sleep Center will have complete and board approved policy and procedures around access well before opening. An individual who arrives at the Center will be greeted and given information including the opportunities, expectations/rules and resources available to them.

The included Sleep Center Welcome Expectations and Guest Agreement, a policy and procedure document, was drafted last year based primarily on Walla Walla Alliance's successful policy. It has not yet been formally accepted by the Board. It will be reviewed and adapted and then approved by the Board prior to starting operations. What is prepared at this time is attached for review. (See Item 9, p.45).

Sleep Center access is on a first-come, first serve basis. The Center will meet all Fair Housing nondiscrimination rules. In terms of availability and schedule, the Sleep Center will be a low barrier emergency shelter open from 6pm to 8 am 365 days/year.

Sleep Center volunteers and the Sleep Center Coordinator will present that information. Their skills will be critical in building the initial "reputation" of Stepping Stones among, most importantly, the people we hope to serve. Life experience has likely taught them to be wary of new places and people. Considering the full scope of what we envision for Sleep Center guests (successful exit to permanent housing) it is critical that initial interactions begin to lay a foundation of trust and respect as well as understanding of "the rules". Stepping Stones philosophy and practice will be that anyone is welcome. We will meet people "where they are at", an inclusive philosophy, that allows people to experience acceptance. That said, there will be expectations for behavior

Both the hours and the year-round availability are a significant change from what has been available in west Umatilla County previously. That word will probably spread quickly and while we anticipate seeing some familiar faces, we hope this expansion of availability will be appealing to some who did not utilize the Warming Station. Each guest will sign a Guest Agreement and may stay at the Sleep Center on a night-to-night basis as long as those standards are met. There is no access to the Sleep Center building during the day. There will be a secure storage shed and bins provided if Sleep Center Guests want to leave their belongings there during the day.

The biggest difference from the previous Warming Station will be that Stepping Stones will have staff, called Navigators, available during the day to facilitate individuals' goal setting and connection to needed resources. Information on how a Guest can access a Navigator and those resources will become part of the Sleep Center's welcome and information sharing. This information will be delivered verbally by volunteers and it will be posted in the Sleep Center and explained in flyers posted and made available to guests.

Presenting this information in a welcoming yet effective manner will be the role of the volunteers and Coordinator who staff the Sleep Center. Volunteer training and the resulting presentations will make all the difference in whether Guests will "spread the word" that this is a good place or not. The desired outcomes of this introduction are that guests feel accepted and accept the expectations. Both outcomes are important.

Sleep Center capacity is expected to be approximately 30. Based on its anticipated size, the maximum occupancy of the modular will be 35. There will be several volunteers and security staff also on the premises. When demand exceeds that number, a covered area located behind the Sleep Center module and generally used as an outside smoke area for Guests, will be converted into an overflow sleep area with secured canvas tent "walls". The capacity of this covered area is yet to be determined.

The Stepping Stones Housing Center is a group of small transitional units which can house 1-2 adults each. To become eligible for a housing unit, an individual must be or have been a Guest in the Sleep Center, they must meet with a Navigator and set and commit to work toward achieving appropriate goals that will move them toward readiness for permanent housing. Individuals who occupy a housing unit become Members of the Stepping Stones community.

There will be a code of conduct expectation and agreement for membership. To maintain eligibility for a housing unit, Members must meet regularly with their Navigator and demonstrate progress toward their goals. Several examples of transitional housing community codes of conduct have been gathered. Some preliminary drafts exist for Stepping Stones however, completion and board approval will be necessary. This work will commence again as soon as the Contract is awarded.

Beyond eligibility, access to a housing unit will be based on availability. The board's plan is to have 25 housing units ready for occupancy at opening. They will become occupied as individuals move through the specified process. A few of the units will be constructed with larger capacity. These will offer a temporary housing option, if needed, for parents with children. It will, however, be a high priority of Stepping Stones to assist families in speedy application for Martha's House in Hermiston, a facility that specifically serves parents with children. Policy will be put into place for utilizing the larger units if there is demand and no families are present.

If individuals are eligible for the Housing Center but no units are available, overflow space will be provided under the covered outside area. Temporary tent-like sides will be installed. These Members will have access to the Navigation Center, its services, and be assisted by a Navigator in setting and working toward their goals.

If a Housing Center member is not making progress on their goals, they will be assisted in revising those goals so they are more appropriate and achievable but still effective. If there comes a point where an individual has shown they are not willing to put forth the effort needed to achieve readjusted, appropriate goals, they will lose their membership and housing unit occupancy eligibility. They would be able to utilize the Sleep Center at night but would not have access to the benefits of Housing Center membership. Specific policy and procedure for this and many other Housing Center related issues will be established.

An important aspect of the Stepping Stones Housing Center experience will be fulfilling assigned tasks and responsibilities related to Center needs, and engaging in activities that foster a sense of community and healthy relationships among members. The opportunity to work in the role of Peer Mentor will be available. Peer Mentors will support other Members, likely new occupants of the Center, with getting settled, acquainted with all that is available and set up for success in their goals.

Housing Center Member policies pertaining to behavior and interactions will be as simple as possible and ideally self-enforced among housing community members. Navigators will oversee behaviors. Issues will be referred to the Assistant Director. Community events and gatherings, as well as celebrations of achievements will be held to strengthen individual motivation and develop camaraderie among members.

CLIENT CONFIDENTIALITY AND SECURITY OF PERSONAL INFORMATION

The following information is a response to expectations that are stated in the RFP under Data Management p.12. Stepping Stones presents this to lay the foundation for further discussion and policy development. It is placed here because it pertains to Stepping Stones Alliance's responsibilities and responses related Guest/Member legal rights, privacy and regulations.

Proposed Guidelines and Policy for

Assurance of Client Confidentiality and Security of Personal Information

Overview:

The basic guideline is that all information and records obtained while providing services to any client are confidential. This guideline sets forth a policy to serve as a format to responding to inquiries regarding clients of Stepping Stones.

Under Stepping Stones guidelines, client information and records will not be released unless the authorization for release is clearly within the several exceptions which allow release. Violation of the guidelines concerning confidentiality will be of great concern to Stepping Stones.

Upon intake, client and staff will go over client confidentiality and discuss parameters of Release of Information form. Information shared by a client is not to be shared unless it is explicitly stated in the release document. When the release of client information or records is allowable under an exception to the basic guideline, no more information or excerpts from records are to be disclosed than the recipient of the information has asked or needs to know. Any information released will be documented in client's Homeless Management Information System (HMIS) electronic file as well as the client's Stepping Stones file which will be secured on the DROPBOX, a secure cloud storage service located in San Francisco, California. For documents that are required to be maintained as hard copies, these will remain in a file cabinet with locking abilities as well as within a locked office.

Any and all requests for documentation from a client file are to be released by the Assistant Director. If the Assistant Director is unavailable the following procedure is to be adhered to only after unsuccessfully attempting to contact the Program Director. There are eleven ways to release information legally:

1. Signed consent form with the proper format. (Release of Information)
2. Internal program communications: One staff member in an agency may discuss a client with another staff member of the same agency.
3. Communications which do not disclose client-identifying information: A counselor in one agency may seek consultation from a counselor in another agency concerning a certain client's circumstances if the first does not give information which would identify that client.
4. Medical emergencies: A client may be identified if the client is suffering from what appears to be a medical crisis and identification will assist in giving appropriate treatment.
5. Client crimes on program premises: A client may be identified to stop or rectify a crime on the premises of Stepping Stones.
6. Research, audit, or evaluation: Authorized agents of research, funding, or licensing organizations may collect data which may have client-identifying information such as social security numbers. Such agents, however, are held to regulations and no information made public may contain client-identifying information.
7. Child abuse and neglect reporting: The staff of Stepping Stones must report such cases in compliance with federal reporting laws. (This includes but is not limited to abuse, neglect, domestic violence in front of a minor, drug use in front of a minor. Staff is to not report abuse or neglect without first discussing with Assistant Director.)
8. Qualified Service Organization Agreement (QSOA): These are agreements between agencies which allow them to share client-identifying information. Many restrictions apply. For example, such an agreement can only be signed with an agency that performs a service for the first agency for a form of compensation.
9. Police: If an officer comes into the center they may walk around in the center "looking for someone". If an officer asks questions about a specific client, staff must answer to the best of their knowledge. At no time may a staff conceal information about a client to a law enforcement officer.

Staff is to be continuously diligent in the preservation of client confidentiality. This includes but is not limited to keeping client records secure, shredding paperwork with identifying information before discarding it, and only discussing clients or talking with clients in a private environment where conversations cannot be overheard.

3. (2 pages) Describe the cultural and language proficiencies of your agency's program staff and your recruitment practices to support and retain staff.

Among the discussion topics Stepping Stones has brought up with potential partners during the preceding months, has been how the barriers that exist because of cultural and language differences can be minimized as we serve our diverse population.

The Stepping Stones board has limited cultural diversity and language proficiency other than English but the staff for the Stepping Stones Center have not yet been hired. The position descriptions for the Assistant Director and the Navigation/Care Coordinator will include the requirement for the individual to be bilingual in Spanish. (See the [Organizational charts, Item 8, p.37-38](#)) We will also invite partner staff to join interviews and invite their feedback on candidates. Ideally these partner staff will bring cultural diversity and bilingual skills to the setting.

-Discuss strategies used to ensure that clients using a language other than English will be able to access services, starting with the first point of contact. Include a description of how and when interpreter services are utilized.

In our visits, we were most impressed by the culturally diverse staff and culture at COPES and helpful ideas were gleaned. We also hope to engage COPES staff frequently with new Members at Stepping Stones. COPES staff are registered Peer Support Specialists and thus their primary work is very similar to the initial tasks of the Stepping Stones Navigator.

Effective communication with Stepping Stones clients will be challenging even when English is the shared language and cultures are in common. The life experience of individuals experiencing homelessness often impacts a person's willingness and ability to articulate needs and wants, let alone goals. These will be careful and likely slow conversations. Relationships and trust take time.

In all cases when interpretation is needed, staff and volunteers will utilize language services. This will be part of training and utilizing that service will be practiced. This is especially important at the first Sleep Center "intake". Volunteers will be fully prepared, having Google Translate on their phone, and having practiced using it. As an individual progresses to meeting with a Navigator, again each of those meetings will utilize these services if bi-lingual staff or an in-person translator is not available.

-Discuss the most commonly presenting non-majority clients served by your agency and important cultural considerations in service planning and delivery.

Hispanic is the most common non-majority culture. In some areas of Umatilla County it is the majority culture. Spanish and its dialects and Guatemalan culture and language were those most often mentioned to us by social services staff with whom we spoke. One medical provider also mentioned Mandarin as a language for which translation services are needed although not frequently.

Considerations for culturally sensitive service delivery mentioned to us included respectful recognition and patient response to individuals presenting hesitancy or mistrust, often developed over years, even generations of living in the United States. In response to that, and as mentioned, it is vitally important to have bilingual staff and/or have and regularly use translation services and interpreters. (We learned that office staff/receptionists in our area often have translation services available but they don't use them often enough to be well prepared to use them or willing to do so. These situations are highly frustrating and can make the situation even worse.)

The primary advice given in relation to the Hispanic culture, particularly in initial meetings, was to allow extra time, even twice as much time. This gives the best chance for the language barrier to be overcome and also it allows, even with Spanish speaking staff, the time needed for contextual information to be heard and acknowledged. Hispanic culture is a verbal culture, rich in story-telling, which requires more than a quick question and answer/yes and no exchange.

-Discuss how your organization will ensure access and service delivery in a culturally appropriate manner to any individual requesting service regardless of the language spoken.

We have learned that OHP provides free translation services by arrangement for dozens of languages. One of the first things Navigators will address is whether an individual needs assistance in signing up for OHP insurance. With OHP and through EOCCO, appointments can be scheduled for online live (often video) services at the time and place of the appointment – this could be in the Navigation Center as easily as in any other provider's office.

In addition, simply having all staff familiar equipped with and practiced in using Google translate will help. Other services for which online services can be purchased and which were recommended by potential partner staff include Language Link, Linguava and Passport to Languages. Further research will be needed. The level of demand for these services will also become clearer once our staff are hired. It is telling, however, that one fully bi-lingual medical office maintains an active subscription to one of these services so they are always prepared for any customer.

4. (5 pages) Provide an overview of your proposed services, including capacity for number served and areas of expertise recognizing that the Project PATH facility will initially be designed with a minimum of 12 sleeping units. Also address how your agency would scale services when additional sleeping units are added or other mechanisms to grow the Project PATH facility are introduced. Include how services will be scaled in year three to add services for Veteran’s, family units, and to provide childcare services.

AN OVERVIEW OF PROPOSED SERVICES – STEPPING STONES OPERATIONAL PLAN

Beginning in early 2021 and after visiting with local area officials and visiting other program sites, the board of the Stepping Stones Alliance worked on developing its operation vision and program plan. This plan, inserted below, has been shared and well-received by local city officials and committees, during presentations and partnership-seeking conversations with various service entities and with local elected officials.

In recognition of this same program plan, in June of 2021 Stepping Stones Alliance was awarded grant money from funds provided to the state legislature from the American Rescue Plan Act. Stepping Stones was also awarded grant money from the Good Shepherd Community Health Foundation earmarked for the purchase of a mobile shower unit.

While Stepping Stones Alliance is not yet in operational, additional planning and purchases have been made based toward this Operational Vision.

This overview chart and the items listed below it attempt to not duplicate details included in other sections. See the Organizational Charts. (Item 8, p.37-38) for many details regarding hours of operations, etc. This section does seek to clarify “where” within the Centers model, the many resources and services will be delivered. A list of Additional Scaled Services is included.

Stepping Stones Operational Vision:

<p>Phase 1 – The Sleep Center Fall of 2022 following a 2021/2022 winter season partnership with Hermiston Warming Station, the year-round overnight emergency shelter will launch.</p>	<p>Phase 2 – The Navigation Center Incremental launch will begin as possible in 2022 as expanded facilities become available and already committed service delivery partners can be scheduled.</p>	<p>Phase 3 – The Housing Center Late Fall/Early winter is targeted for opening the first group of small housing units to those demonstrating readiness. Additional units will be added as participant numbers increase.</p>
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The Pathway to Self-Reliance

<p>Enter here: The Sleep Center Night to night shelter for those in need Maximum of 35 in modular bldg.; Accommodate overflow in outside tent shelter, set up when needed.</p>	<p>Then engage here: The Navigation Center Needed services and access to resources are available to active participants delivered during all operational hours by staff, community partners and volunteers</p>	<p>Stability while progressing: The Housing Center Initial 25 transitional housing units for participants engaged with Navigation Center resources and personal action plan</p>
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Phase 1: Sleep Center

1. This will be a large modular building within the site fencing but separate from the rest of the project. The building will have its own entrance. It will be locked throughout the day. Staff will be in the Sleep Center during all its operational hours
2. Admission to the Sleep Center will occur from 6:00 pm to 10:00 pm. No admission will be allowed after 10:00 pm unless prior arrangements have been made or an emergency admission is deemed necessary via law enforcement or medical personnel.
3. The Sleep Center will have an outside storage area, a smoke area and a fenced area for pets.
4. Inside the Sleep Center will be set up like a large dormitory with beds, storage totes, a small kitchenette for warming foods, 2 half bathrooms, a small computer work station area and a small commons area.
5. All individuals will initially spend time at the Sleep Center.
6. The Sleep Center will not discriminate against any person on the basis of race, color, religion, creed, political ideas, sex, age, marital status, physical or mental handicap, national origin, or ancestry. (Excerpt from RFP p. 8)
7. Sleep Center guests will have the opportunity to engage with the Navigation/Care Coordinator if the guest is interested in becoming a Housing Unit Member.
8. Sleep Center will have written, posted expectations/rules regarding what can be brought in and what will be confiscated and locked up and what will not be allowed on the premises.
9. Sleep Center guests will be able to get vouchers from the Sleep Center Coordinator to use the shower unit during daytime hours. Use will be at a scheduled day and time.
10. Guests will be able to leave some belongings in a secure area during the day time but guests will not have day time access to those items. Items left for an extended period will not be kept at the Center as per the signed guest agreement.
11. Guests will not be allowed to loiter around the Site property during day time hours and will be subject to trespass.
12. In the event of overflow need for emergency housing, additional cots and mats can be placed within the Sleep Center building and/or an overflow tent may be placed on the concrete pad behind the Sleep Center to provide for additional sleep area.

Phase 2: The Navigation Center

1. The Navigation Center will be a double wide mobile structure owned by the City of Umatilla
2. The Navigation Center will be in a fenced secured area
3. The Navigation Center will house the office space for the Program Director and the Assistant Director
4. The Navigation Center will have a Navigation/Care Coordinator and will have additional Navigators (as needed) who will be trained in Crisis Recognition. These individuals will be tasked with meeting with each Housing member and setting goals, developing appropriate goal action plans and scheduling regular progress assessment meetings with the Housing members.
5. The Navigation Center will have several partitioned office areas where Service Delivery Partners will meet 1:1 with Guests/Members.
6. Washer and dryer will be located in the Sleep Center or in Navigation Center (tbd) and will be available per signup to Housing Center members. Sleep Center Guests will be able to have their laundry done by Sleep Center volunteers or staff on designated nights. Staff or volunteers will operate the appliances.
7. The Navigation Center will have computer work stations available for Housing Member use.

8. The Navigation Center will have an open area suitable for small classes or group sessions.
9. No weapons, drugs or banned substances will be allowed in the Navigation Center.
10. The Navigation Center will be staffed during all open hours.
11. The Navigation Center will have a kitchen area that will be secured in a way that Housing Members are able to access and use, per a sign-up sheet, from 6:00 am until 9:00 pm daily.

Phase 3: The Housing Center

20 individual units will be built and ready for use by Winter 2022/2023.

They will house 20 individuals/couples

1. The Housing Center will be in the same secure fenced area as the Navigation Center.
2. The Housing Center will be open to Housing unit members 24 hours a day but no access to the grounds will be permitted between the hours of 10:00 pm and 8:00 am unless prior arrangements have been made (due to work, counseling session, classes etc.) or in the case of an emergency.
3. There will be a qualifying process to become a member of the Housing Center and to gain transitional housing.
4. All members will have spent time in the Sleep Center and will have established appropriate goals and a plan with a Navigator. Housing unit members will all set appropriate attainable goals towards long term permanent housing of their own.
5. All members will sign a Code of Conduct and agree to abide by all Housing center rules.
6. No weapons, alcohol or banned substances will be allowed on the Housing center site.
7. A 2 unit portable shower trailer, already in our possession, will be available per signup, for Housing Center members.
8. All Housing center members will participate in keeping the Center neat and clean.
9. Housing Center Members will have access to scheduled use of: the community kitchen, shower trailer, computer work stations, laundry facilities and any other community facilities.
10. The Housing Center will uphold the same non-discrimination policy as the Sleep Center.
11. Each housing unit may house one person/couple. Access to services for Veterans will be available upon startup of the Housing Center. Connections have already been established with Veteran Services.
12. Family units may apply to become Housing Center members after staying at the Sleep Center and after verifying family relationship.
13. A navigator will assist family units needing childcare in making contact with the necessary resources and will provide assistance in helping them obtain transportation. Childcare will not be available on site and adults are responsible for the care and supervision of their children while on the Stepping Stones site.

Response to increased demand:

- In the event of overflow, the covered concrete pad in the Sleep Center outside area will have drop down canvas sides that can provide a place for additional cost to be placed for additional Guests or Housing Members.
- The Conestoga huts are constructed of quickly available materials and are quick to construct (approximately 24 man hours). On the two acres of land available, there will be room to add additional housing units if the need arises.
- Ready to add an additional 10 housing units. This will include 2 larger units for family use (families staying at the Stepping Stones Housing Center will be encouraged and assisted in applying for housing at Martha's House)

All individuals receiving service at the Stepping Stones Site will have access to:

1. Scheduled transportation to and from the site via: Kayak and/or City taxi services. Specific drop off locations and times will be established.
2. Some parking will be available for member vehicles but the vehicles must be drivable and be registered with the Program Director.
3. All individuals will have access to small food pantry, clothing pantry
4. The opportunity to meet with the Navigation/Care Coordinator and strive to become Housing Center Members.

Scaled Services and Other/Additional Service Offerings Available by Year 3:

1. Additional larger units structured for families in need of short-term transitional housing.
2. An on-site van available to assist in transportation needs in relation to jobs, training, education or medical needs that are not able to be met by: Kayak, City Taxi, Care Van or other public transportation.
3. On-site vocational (job skills) training per market demand for employment (TBD)
4. Self Reliance skills training including
 - a. Garden classes (onsite raised bed gardens)
 - b. Cooking classes
 - c. Clothing care classes
 - d. Budgeting and basic money management classes
5. Basic automotive care classes (see site layout which includes Safe Parking spaces)
6. Training for Housing Members to become Peer Mentors
7. High School Interns providing volunteer services
8. Job Search preparation
 - a. Resume, cover letter
 - b. Job applications
 - c. How to introduce yourself
 - d. Interview preparation and practice
9. Scheduled Celebrations for those achieving goals
10. Community Activities such as: barbecues, movie nights, card nights etc.
11. Access to hair cuts

5. (1 page) Describe how your services will utilize the information contained in the 2021 Umatilla County Community Health Assessment (CHA)._
<https://ucohealth.net/community-health-assessment-2021-2022>

The process of data collection and therefore the information contained in the 2021 Umatilla County Community Health Assessment (CHA) was highly impacted by the COVID 19 pandemic and the unprecedented response demanded of health officials. From our review of that process and decisions that resulted, as well as recent updates on the status of progress toward completion of the Community Health Improvement Plan, we appreciate that a multitude of factors have come together that impact the output.

That said, there is no question of the importance of the work that is continuing. Community Health Improvement Plans are important and even, in the best of times, have limitations. Large scale plans come with effort. To that point Cathy Lloyd is involved in two working subgroups, Mental and Behavioral Health and the Homelessness. She will continue that involvement in part because the lives of the individuals Stepping Stones seeks to help are so dramatically impacted by health care access barriers and gaps in equity of health care delivery.

Areas of concern across community health are often directly and/or indirectly linked to homelessness and become barriers to gaining housing and self-sufficiency.

We anticipate that in full operation, Stepping Stones will not only facilitate access to health care services by some of the county's most vulnerable citizens, but that improved access will bring individuals directly to providers rather than the Emergency Room. Stepping Stones has the potential to become a new conduit for more efficient and cost-effective access to health care, for impacting health care equity in west Umatilla County, as well as adding to data, in terms of demographic, health status and behavior information, on a population segment that is historically hard to find.

6. (4 pages) Provide your anticipated budget for years 1 and 2 to reflect the cost-of-service delivery relative to the stated services to be delivered. Also include how the addition of services in Year Three will impact the cost-of- service delivery for Project PATH.

A description of the budget set up, per the RFP direction, is included on the Budget Summary page below with necessary four pages of budget below. To clearly address Costs and Resources (Evaluation Criteria) line items we provide these responses:

- **Financial and administrative stability:** Stability can confidently be deduced from the level and tenure length of Board members when functioning at Executive Leadership levels, experiences which included oversight of large corporate and non-profit budgets over the course of many years.
- **Obtain resources:** Experience is shown in the resources which Stepping Stones brings to the table at this time. Good Shepherd and Fair Housing funds are grants for which we applied and were awarded. HWS’ donation of its remaining inventory is also evidence, as is the sponsorship obtained from AWS which supported winter season Warming Station staffing. Taken from an element of the budget not included in this document, current **revenue** is identified:

48,000	Good Shepherd Community Foundation Grant						
10,000	Fair Housing Grant						
50,000	donation from Church of Jesus Christ of Latter Day Saints/not finalized until August 2022)						
40,000	individual donations						
1,000,000	District 57 American Rescue Plan						

- **Bring resources:** The total of the current revenue listed above is \$1,148,000. The Good Shepherd funds have already purchased the 2-unit shower trailer which is in our possession and ready for immediate use on the new site.
- **Willingness to negotiate terms:** Stepping Stones, as a new entity, has no encumbering obligations which might limit willingness and ability to negotiate an agreement for PATH. This project embodies our full vision.
- **Cost of Service Delivery and Monthly Rate for Facility Operation:** The projected annual Service Operations budget total is based on our best sense of expenses, acknowledging the yet unknown level of responsibility for ongoing utilities and property maintenance costs. This figure is impacted by our access to the American Rescue Act Funds, which are now budgeted to cover salaries and wages both years and significant other capital construction. Based on these factors, Stepping Stones projects a monthly flat rate of \$24,890.

YEAR THREE

No separate budget is designated for Year Three add-ons. The Year Three add-ons mentioned in the RFP will be addressed within the Years One and Two budgets.

1. **Veterans:** Information will be provided to members about the services available to veterans. Office space will be provided for Veteran Service personnel to meet with veterans and facilitate transportation for veterans to the local Veterans office in Hermiston. We have also established a partnership with Nyla Holt, SSVF (Supportive Services for Veterans Families Outreach Manager, who does ‘in the field’ outreach for veterans in the county.
2. **Families:** It is the intention to build two slightly larger Conestoga huts for families that will be available on the opening day of the Housing Center. Family units will be accommodated in the Sleep Center first if confirmation of family relationships is needed. Stepping Stones has also made a commitment to facilitate referrals to Martha’s house. This process can take a week or more. Stepping Stones will provide transitional housing until the Martha’s house application process is complete.
3. **Child Care:** While child care will not be available on site to Housing Center members, Navigation staff will assist members in locating child care resources and assist in providing transportation on an as needed basis.

BUDGET SUMMARY

The budget is divided into set up (aka Administrative development) and operational costs (aka Service Operations). These are estimates since product prices change on a regular basis and it is still undetermined how much support cities will provide with respect to staffing. Additionally as a cost containment measure, the Stepping Stones board and the Executive (Program) director will seek ways to use volunteers, get material donations and obtain in-kind donations. (i.e. the budget contains the cost of a new on-site van but hopefully a good used van will be able to be obtained). Currently our direct to non-direct or administrative costs is very small. Board members are not being reimbursed for their time or services so administrative costs currently consist of the expense of licensure and the expense of a mail box. It is anticipated that this will continue to be the trend.

Shared Costs	
Fencing	
Outdoor Lights	
Outdoor Security System	\$21,000 <i>\$18k + poles and pole setting cost estimate</i>
Executive Director	
Van	\$45,000
Pick up Truck	\$30,000
indoor security system including monthly service	
Space for additional input	
Total Shared Costs	\$96,000
Sleep Center Costs	\$482,060 See "Sleep Center Costs" tab for detail
Navigation Center Costs	\$236,475 See "Sleep Center Costs" tab for detail
Housing Center Costs	\$420,606 See "Housing Center Costs" tab for detail
Total Direct Costs	\$1,235,141
Indirect Costs	\$ 5,250.00 Includes: licensing, PO Box, accounting costs
Indirect vs direct costs:	0.42%

Breakdown of total costs (excluding shared costs):

Service Operations	\$298,680.00
Administrative Development	\$840,461.25

SLEEP CENTER COSTS

<u>Expense</u>	<u>Total Amount</u>	<u>Additional Info</u>	<u>Type of Cost</u>
Fencing	\$4,400	<i>just around sleep center modular</i>	set up
Covered concrete patio	\$1,251	10'x15'x7' patio cover Arrow Home Depot unassembled	set up
Fenced Area	\$750	<i>for pets</i>	set up
covered smoke area	\$1,251	10'x15'x7' patio cover Arrow Home Depot unassembled	set up
modular for sleep center	\$250,000	<i>includes set up</i>	set up
replacement items	\$2,000	<i>bedding, general supplies</i>	operational
misc supplies	\$2,000	<i>kitchen and food supply replacement</i>	operational
4 replacement beds yearly	\$1,280		operational
Beds	\$8,000	<i>25 bunks</i>	set up
dishwasher	\$528	<i>whirlpool/hone depot</i>	set up
storage shed	\$7,600	<i>High Cube used insulated container 8'x8'x40'</i>	set up
large bulletin/white board for communication	\$100		set up
Sleep pads	\$0	<i>HWS donation</i>	set up
refrigerator	\$813	<i>20 cubic/home depot</i>	set up
microwave	\$0	<i>HWS donation</i>	set up
double sink	\$180		set up
hot water urn	\$0	<i>HWS</i>	set up
dish sets	\$500	<i>12 sets for 4 plates, cups, bowls, small plates</i>	set up
glasses	\$150	<i>64 glasses</i>	set up
washer and dryer	\$0	<i>HWS donation</i>	set up
Silverware for Kitchenette	\$250	<i>6 sets of 8 settings</i>	set up
Food Supplies for Kitchenette	\$1,500	<i>oatmeal, tea, coffee, etc.</i>	set up
2-3 Long Tables	\$0	<i>HWS donation</i>	set up
Folding Chairs	\$0	<i>HWS donation</i>	set up
Intake desk	\$0	<i>HWS donation</i>	set up
Locking filing cabinets	\$0	<i>HWS donation</i>	set up
Totes for overnight items	\$0	<i>HWS donation</i>	set up
Totes for day items	\$2,212	<i>50 gallon heavy duty wheeled trash can 25 for sleep center guests 88.49</i>	set up
Sleep center Coordinator	\$25,000	<i>20/week \$20/hour</i>	operational
Security Cameras	\$0	<i>SSA and HWS donation</i>	set up
Small area for volunteers w seating	\$1,000		set up
Small sitting area for guests	\$2,000		set up
floor lamp for volunteer area	\$150	<i>for volunteer and security guard area</i>	set up
Shower vouchers	\$0	<i>SSA donation</i>	operational
Small food pantry	\$1,000		operational
Small clothing pantry	\$0	<i>donations</i>	operational
Small toiletry pantry	\$0	<i>donations</i>	operational
Copies of Policies and Procedures	\$0	<i>donation from Fair Housing</i>	set up
Printed Spanish/English conduct agreements	\$200		set up
bulletin board	\$65		set up
Partitioned area for searches	\$0	<i>Lloyd donation</i>	set up
Locked area for contraband	\$200		set up
Fire Extinguishers	\$150	<i>6 extinguishers</i>	set up
smoke and CO2 alarm	\$60	<i>30 detectors/\$30 each</i>	set up
security staff	\$153,000	<i>14 hours/night/\$30/hour 365 days/year</i>	operational
First aid and CPR Training	\$2,500		operational
Crisis stabilization training	\$0	<i>through CCS</i>	operational
twin mattresses	\$8,000	<i>50 for sleep center</i>	set up
mattress covers	\$1,000	<i>50 mattress covers</i>	set up
plastic sheets	\$1,000	<i>50 plastic sheets</i>	set up
pillows	\$750	<i>50 pillows</i>	set up
plastic pillow covers	\$500	<i>50 pillow covers</i>	set up
sheets and pillow cases	donations	<i>HWS</i>	operational
blankets	donations	<i>HWS</i>	operational
clip on bed lights	\$720		set up
Total Sleep Center Costs	\$482,060		

NAV CENTER COSTS

<u>Expense</u>	<u>Total Amount</u>	<u>Additional Info</u>	<u>Type of Cost</u>
Community Bulletin Board	\$100		set up
lap top for executive director	\$1,600		set up
Executive Director	\$40,000	<i>including benefits</i>	set up
Executive Director	\$60,000		operational
Assistant Director	\$50,000	<i>including benefits</i>	operational
Common Building	\$50,000	<i>Double wide owned by City of Umatilla: get copy of size and floor plan</i>	set up
Remodel Expenses	\$10,000	<i>partitioning bedrooms/seperating kitchen from the rest of the center</i>	set up
Furniture for Common Area	\$4,000		set up
Computer Work Station	\$7,000	<i>towers, keyboards, mouse for 6 stations/Best Buy items</i>	set up
commercial washer	\$2,500	<i>staff use to wash bedding items</i>	set up
commercial dryer	\$2,500	<i>staff use to wash bedding items</i>	set up
4 computer desks	\$500		set up
4 desk chairs	\$275		set up
computer printer/fax machine	\$1,500		set up
2 four drawer locking file cabinets	\$400	<i>get lateral cabinets for hanging files</i>	set up
office supplies	\$1,000		operational
intake desk	\$200		set up
member lockers	\$3,000	<i>2 sets/36 lockers</i>	set up
Office Desk and Chairs	\$1,000	<i>Support Services</i>	set up
computer software	\$900	<i>Office 365 \$12.50 per mo. 12 months x 6</i>	operational
Sleep center Coordinator	TBD		
Facility Coordinatator	TBD		
Navigation Coordinator	TBD		
Total Costs	\$236,475		

HOUSING CENTER COSTS

<u>Expense</u>	<u>Total Amount</u>	<u>Additional Info</u>	<u>Type of Cost</u>
Conestoga Huts	\$50,000	<i>25 huts</i>	set up
Heating Units	\$2,760	<i>need 25</i>	set up
Wiring for Housing Units	TBD		set up
Power Source for Housing Units	TBD		set up
Covered Outside Common Area	\$6,000	<i>15x20 area on concrete pad</i>	set up
storage area	\$1,520	<i>2-High Cube used insulated container</i>	set up
smoke and co2 detectors	\$900	<i>30 total</i>	set up
Picnic Tables	\$1,600	<i>4 folding adult size tables w/bench</i>	set up
Lighting for Outside Common Area	TBD		set up
Common Building	\$250,000		set up
Shower Unit w Sign up Sheets	\$48,000		set up
Power for Shower Unit	TBD		set up
Water Access for Shower Unit	TBD		set up
Water Drainage Access for Shower Unit	TBD		set up
Community Bulletin/Notice Board	\$100		set up
Fenced Pet Area	\$736		set up
Smoke Area	\$1,250	<i>10'x15'x7' patio cover Arrow Home D</i>	set up
Chairs for Smoke Area	\$100		set up
Ash trays for Smoke Area (2)	\$140		set up
Fencing around entire site			
porta pots (Jimmy Johns	\$3,500	<i>4 porta pots for housing unit area</i>	set up
portable hand washing station	\$3,200		set up
shower unit	\$48,000		set up
electrical and water set up	TBD		set up
washers and dryers for member use	\$2,800	<i>2 sets/Samsung</i>	set up
Total Housing Center Costs:	\$420,606		

7. (1 page) Describe the strategies your agency uses for cost containment including the ratio of direct to non-direct or administrative costs. Submit the findings of the last three fiscal audits of your agency (will not count toward page total). Please ensure that the date of the audits is clearly indicated. If your organization has not completed three fiscal audits, please provide available audits, available internal financial reports, and the name of your auditing firm.

Stepping Stones Alliance Cost Containment Measures:

- The model chosen for the housing unit is called a Conestoga Hut. This model has been in use in both Walla Walla Washington and in Eugene Oregon for five or more years. The supplies cost approximately \$1600 and the unit is easily made. A sample unit was built by four SS board members and advisory council in June 2020. The board investigated the pallet shelters as well as a variety of stick-built units and determined that the Conestoga huts costs are between \$3000-\$6000 less per unit than other housing options.

- The board will use a combination of paid and volunteer labor to build the huts which increases savings.
- The Conestoga hut with its triple layer of insulation reduces the amount of electricity needed for additional heating.
- The Conestoga huts are simple housing units containing a heating unit and a bed platform. This reduces the cost of building as well as upkeep.
- Since the Conestoga hut is made out of common materials such as lumber, pvc pipe, wire cattle panels etc., repairs can be made easily and quickly when needed.
- The SS board will actively recruit community individual and company donations through its website as well as through in person presentations to various service organizations and churches.
- The Stepping Stones project will use service partners/organizations to provide the professional services and support that Housing members will require.
- Stepping Stones continually seeks financial donations, material donations and in-kind donations to help minimize costs to the project.
- To keep staff costs down, the Sleep Center Coordinator will be actively engaged in outreach, recruitment and coordination of volunteers to staff the Sleep Center. Additional volunteers will be recruited for tasks and roles other than the Sleep Center. These needs will emerge once Stepping Stones is operational.
- Donated time: Board members actively work on the project without any compensation.

Financial Audit Report

Prepared by

Jenna Gordon

HardSave, LLC

Fiscal Year ending: December 31, 2021

Executive Summary

This report details the audit and inspection done on the company's order and internal auditing process. Upon inspection, it was recognized that the company had efficient processes. Also included in the report are identified areas for improvement in line with human resources during busy hours or peak seasons.

Objectives

The following objectives were accomplished during the conducted audit:

1. Review the accuracy of the financial statements.
2. Evaluate the effectiveness of internal controls.

Scope

This report covers the company's financial statements and internal control process in pursuit of the company's mission to provide overnight housing and assistance to homeless or low income persons in the area of Umatilla County for the duration of 2021.

Assessment

- Minimal transactions occurred during the year: primarily expenses incurred for project management, a short term note and donation(s).
- Receipts and financial records are complete.
- Recommendation to require two check signers to strengthen internal control.

Conclusion

The company's financial statements and internal control processes are accurate and adequate for the duration of the inspection, including all receipts and financial records. Boardmember are also informed about the process and know about the protocols that the company observes in terms of keeping 100% audit and financial records.

Recommendations

- Two check signers are recommended to increase internal controls.
- Centralize storage of support documents including invoices and notes.



HARDSAVE, LLC

To the Board of Directors
Stepping Stones of Hermiston, Inc
Hermiston, Oregon

Date **1 July 2022**

We have audited the accompanying statement of financial position of Stepping Stones of Hermiston as of December 31, 2022, and the related statements of activities and change in net assets, functional expenses, and cash flows for the year then ended. These financial statements are the responsibility of Stepping Stones of Hermiston's management. Our responsibility is to express an opinion on these financial statements based on our audit.

We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement. An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements. An audit also includes assessing the accounting principles used and significant estimates made by management, as well as evaluating the overall financial statement presentation. We believe that our audit provides a reasonable basis for our opinion.

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of Stepping Stones of Hermiston as of December 31, 2022, and its change in net assets and its cash flows for the year then ended in conformity with accounting principles generally accepted in the United States of America.

Sincerely,

Jenna Gordon

Jenna Gordon



Stepping Stones Alliance, LLC

Statement of Financial Position

As of December 31, 2021

	TOTAL
ASSETS	
Current Assets	
Bank Accounts	
Basic Business Checking (8212) - 1	48,076.04
Total Bank Accounts	\$48,076.04
Total Current Assets	\$48,076.04
TOTAL ASSETS	\$48,076.04
LIABILITIES AND EQUITY	
Liabilities	
Current Liabilities	
Other Current Liabilities	
Short-term business loans	14,160.00
Total Other Current Liabilities	\$14,160.00
Total Current Liabilities	\$14,160.00
Total Liabilities	\$14,160.00
Equity	
Retained Earnings	174.04
Net Revenue	33,742.00
Total Equity	\$33,916.04
TOTAL LIABILITIES AND EQUITY	\$48,076.04

Stepping Stones Alliance, LLC

Statement of Cash Flows

January - December 2021

	TOTAL
OPERATING ACTIVITIES	
Net Revenue	33,742.00
Adjustments to reconcile Net Revenue to Net Cash provided by operations:	
Short-term business loans	14,160.00
Total Adjustments to reconcile Net Revenue to Net Cash provided by operations:	14,160.00
Net cash provided by operating activities	\$47,902.00
NET CASH INCREASE FOR PERIOD	\$47,902.00
Cash at beginning of period	174.04
CASH AT END OF PERIOD	\$48,076.04

Stepping Stones Alliance, LLC

Statement of Activity January - December 2021

	TOTAL
Revenue	
Sales	46,380.00
Total Revenue	\$46,380.00
GROSS PROFIT	\$46,380.00
Expenditures	
Advertising & marketing	
Website	5,000.00
Total Advertising & marketing	5,000.00
Contract labor	
Contract labor - Project Management	7,500.00
Total Contract labor	7,500.00
General business expenses	100.00
Bank fees & service charges	38.00
Total General business expenses	138.00
Total Expenditures	\$12,638.00
NET OPERATING REVENUE	\$33,742.00
NET REVENUE	\$33,742.00

8. **(3 Pages) Describe how your organization will meet the staffing requirements to provide 24-hour coverage to create a safe and secure environment at the Project PATH facility. Provide resume or curriculum vitae for leadership team (will not count toward page total) and a proposed organizational chart of the Project PATH team. If you are planning to hire staff upon award of contract, describe how you will be able to meet the contract requirements from the contract start date.**

STAFFING – ORGANIZATIONAL CHARTS

Note: Leadership Qualifications Vitae (4 pages) is included following the charts.

Stepping Stones has developed two organizational charts. One, **Site Operations**, reflects the entire operation, showing all the positions under the Program/Executive Director and supervision lines. Included you will find the anticipated hours/schedule of all these staff which provides for 24/7 coverage.

Note that site and building safety and security are also provided for by fencing, locked gates, physical equipment including exterior lighting, cameras, and a security system. Interior spaces, especially the Sleep Center, are also equipped with camera and security system for monitoring overnight by security staff.

The second organizational chart, **Service Delivery Partners**, names the organizations which provide the Required Services and which have agreed either verbally or through a letter of support to partner with Stepping Stones.

The Service Delivery Partners chart clarifies their lines of communication with the Navigation/Care Coordinator for scheduling and Assistant Director for partnership agreements and on-going collaboration. The Program Director will maintain full oversight including a key role in fostering healthy, productive, on-going relationships and agreements with these critical partners.

Additional service providers have been contacted and with whom relationships have been established. These are prepared to provide value-added services from Year One.

STATEMENT ON FUNDING TO HIRE AT CONTRACT DATE

Staff salaries and wages for Year One and Year Two are identified in the budgeted items for the awarded American Rescue Act funds (\$1M) and will be covered by that budget.

LEADERSHIP QUALIFICATIONS - VITAE

(not counting in page requirement)

Please see the inserted documents which presents the experience and qualifications of the Stepping Stones Board of Directors and Planning staff.

Qualifications Vitae

**STEPPING STONES ALLIANCE
LEADERSHIP TEAM**

Professional Expertise

Executive Leadership

Executive Director, Umatilla County Housing Authority, 9 months
General Manager and CEO, Umatilla Electric Cooperative, 25 years
Executive Director, Support Services/Operations Mgmt., Trios Hospital, Kennewick, 15 years
Founder and President, Atkinson Staffing, a mid-sized company, over 30 years
Founder and President, Agri-Labor, Inc., a mid-sized company, 8 years
Administrator for Columbia Region, Elder Care Company

Civic Involvements, Leadership and Membership

Board chair, Hermiston Warming Station, Chair 3 years; Vice Chair 1 year
Volunteers, Hermiston Warming Station, 7 years
Board members, Stepping Stones Alliance, 11 years total

Board, Good Shepherd Health Care System, 19 years
Board, Oregon Association of Hospital and Health Systems, 2 years
Board, Trucare Pregnancy Clinic, 8 years
Board, Hermiston Rotary Foundation, 7 years
Various Industry Association boards, multiple years
President, Umatilla School Board, 2 years; 3 additional years as Board Member
President, Oregon Association of Talented and Gifted, 2 years, 6 years total service
Priest in Charge, St. John's Episcopal Church, 25 Years
Assistant Band Director, Hermiston High School, 10 years
Current President, Altrusa of Hermiston, member 8 years
President and "Volunteer of the Year" Hermiston Little League
Hermiston Education Foundation, member

Business Development, Management and Support

Helped launch Eastern Oregon Telecom and LS Networks, a fiber optic company (during tenure as UEC General Manager)
Instrumental role in the successful competition for Amazon Data Systems to locate in Umatilla Electric's service area, approx. 2010
Strategic Planning, Designated Lead, as Executive Director, Trios Hospital, Kennewick, 15 years
Owner, Becoming You – providing training and counseling to parents and families
Assistant Manager, Hallett Cinemas LLC, 2 years
Executive Assistant to General Manager, PGE, Hermiston Generating Plant, 11 years
Atkinson Staffing, a mid-sized company, Founder and President, over 30 years
Agri-Labor, Inc., a mid-sized company, Founder and President, 8 years
Clover Housing Group, a small business, Founder and President, 5 years

Financial Oversight and Management

Per Executive Leadership experience, listed above:

Full budget oversight, all budgets, 15 hospital departments, 15 years
Full budget oversight, as General Manager, 25 years
Full budget oversight, Atkinson Staffing, Agri-Labor, Clover Housing Group, total 43 years

Financial Oversight and Management cont.

Budget development and full oversight; multiple WA state grant-funded customized training programs, Worker Retraining Allocation & WorkFirst Block Grant, 11 years
Human Resources Department, Lamb Weston, 8 years
Independent contractor, Customized workforce/workplace training, 5 years
City Treasurer, City of Heppner, 5 months

Partnerships and Collaborations

Ogden-Weber Community Action Partnership, Regional Director, Volunteer Income Tax Assistance (VITA), 4 years
Diocese of Eastern Oregon
Gateway to College Programs, a K-12/Community College partnership model, provided Start-up & on-going program support, 5 years

Education, Training and Human Services

Program/Project Development and Management

Program Manager, Volunteers of America, transitional housing program for young men, Utah, 4 years
Program Manager, Elijah Family Homes, a transitional housing and recovery program for parents and children, 1 year
Case Manager, Lantern House Homeless Center, 3 years
Regional Director, VITA, Ogden Weber Community Action Partnership, 4 years
Facilitator for Alzheimer Association
Programs Manager, WorkFirst (low-income parents) & Customized Workforce Training, 6 years
Project Director, YouthBuild, DOL grant-funded, youth re-engagement program, 1 year
Program Development & Instructional Coach, Community colleges nation-wide, for Gateway to College National Network (re-engaging out-of-school youth), 5 years

Direct Service Delivery

Assistant to VSO, Morrow County Veterans Services, 3 years
Provided speech/language/hearing services, testing, Hermiston School District, 5 years; Umatilla Educational Service District, 3 years
Facilitator, Alzheimer Association
Student Success Coach, & WorkFirst JOBS Engagement Specialist, BMCC, 5 years
Academic Advisor, Success Coach, and Faculty, Human Development Dept., Adult High School Diploma Program, Worker Retraining Programs, 17 years
Substance Abuse Group Facilitator, Ogden, UT, 3 ½ years
Substance Abuse Counselor, Ogden, UT, 2 years
Substance Abuse Counselor, Metamorphosis, 1 year

Service Delivery Coordination

Associate Director, Clark College at Town Plaza, a Washington WorkSource One-Stop location including employment, social and health services, basic education and workforce training and vocational rehabilitation providers, 4 years
Chair, Northern Utah Case Management coalition, 2 years

Education

Graduate degrees:

MSW, Saint Louis University, 2010
MBA, Portland State University
MS Educational Audiology, Utah State University
MS Vocational Technical Education, Washington State University

Education cont.

Undergraduate degrees:

BA, Social Work, Idaho State University, 2003
B.TH, Northwest Christian College
BS, Speech Communications Disorders, University of New York Buffalo
BS, Secondary Education, Washington State University
BS, Electrical Engineering, Oregon State University AA,
Ricks College, Idaho

Professional Certificates, Licenses, Endorsements

Endorsements in Speech and Language; Special Education; Gifted Education; K-12 Certification
Leadership Training for Workforce Deans, Centers of Excellence, WA State Community Colleges

Courses for professional development, including electric utility, telecom, Human Resources,
management (including financial management), National Rural Cooperative Association,
Northwest Public Power Association, Governance Institute, Estes Park Institute

Courses for business management, Oregon State University

Certified Doula, State of Oregon (53 babies and counting)
DAT Responder, Red Cross, 2 years
FEMA Certified – Emergency Preparedness
Teacher/Trainer: Becoming a Love and Logic Parent
Trainer: De-escalation

Second Language Proficiency

Spanish (1) American Sign Language (1)

Practical Skills

Carpentry, Electrical, Electronics

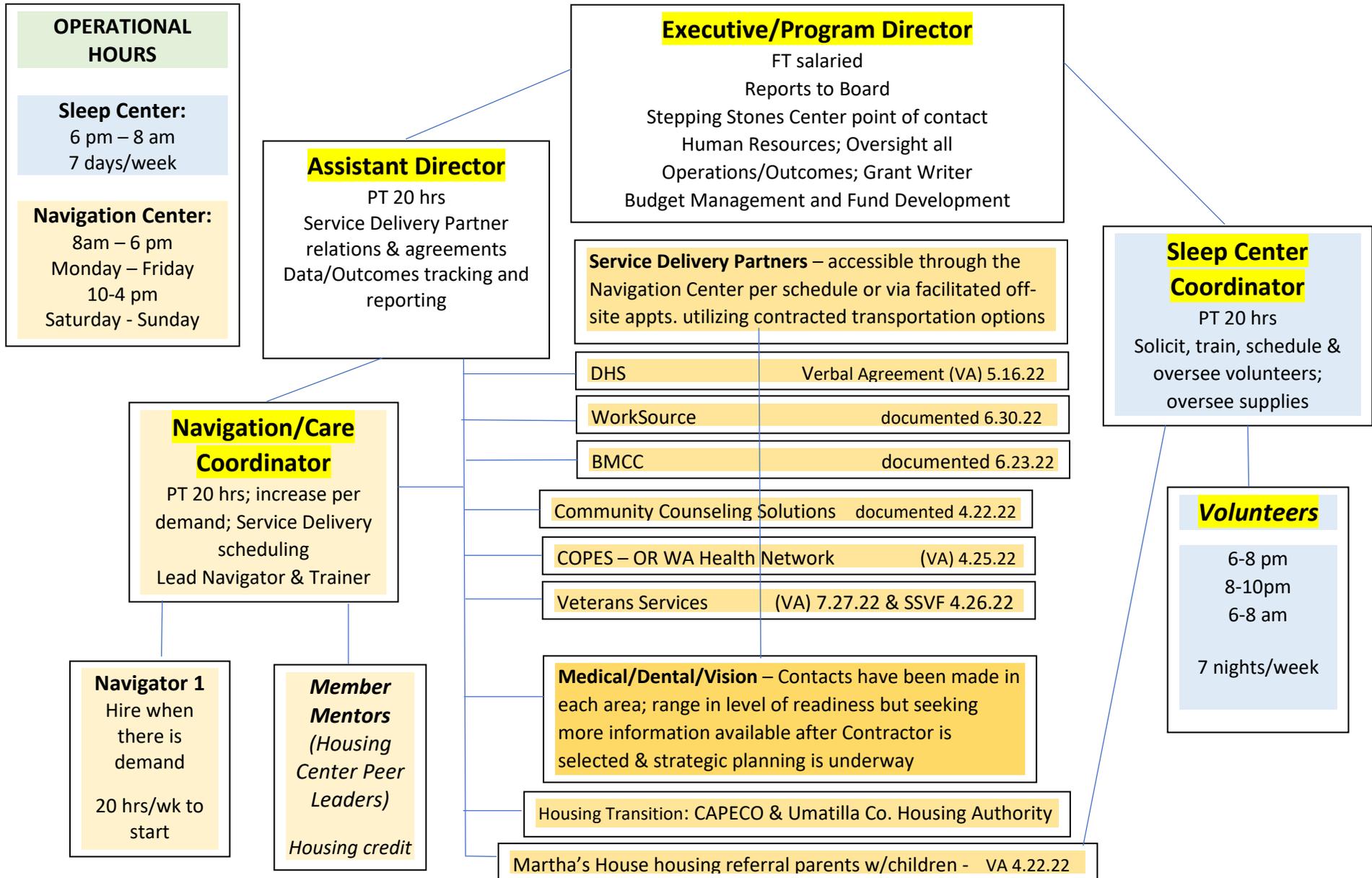
Collective Years of Volunteering & Service to Special Populations

23 years – Combined service with Hermiston Warming Station
30 years – Providing direct services: advising, success coaching, teaching, care & training
services to special populations including: low-income parents, dislocated workers, English
language learners, developmentally disabled, veterans' services, out-of-school youth re-
engagement, elder care, Alzheimer's and dementia care, speech and language learners,
substance abuse counseling

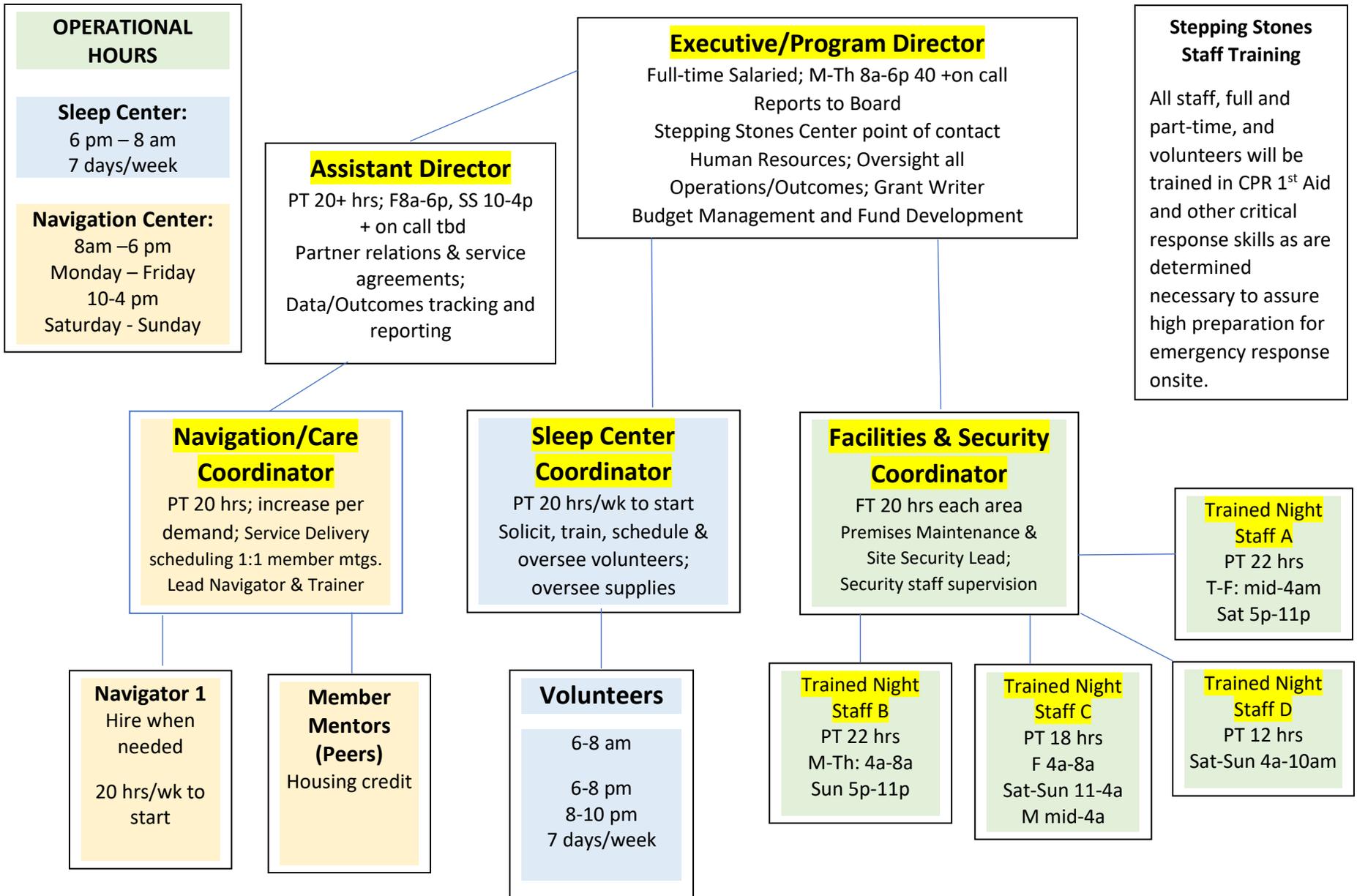
Life Experiences/Unique Accomplishments

- Facilitated collaborative new program planning among K-12 districts, community colleges and social service providers, establishing braided-funding agreements, coordinated outreach efforts and referral systems – Gateway to College National Network locations in PA, New Jersey, CA, Kansas, Texas, MN, WA, Ohio
- Experienced unstable housing, low income, young mother; experienced domestic violence at young age.
- Foster care system, entered at age 7; exited to adoption age 10 (abusive home); lived homelessness during childhood
- Designed, with architectural team, two hospitals and multiple additions. Directed construction of new hospital on Greenfield site in Kennewick, WA. Directed construction of 6-floor medical office building at same site. Worked with State and local jurisdictions for site, licensing, compliance with codes, etc.

STEPPING STONES ALLIANCE – **Service Delivery Partners** Organization Chart



STEPPING STONES ALLIANCE **SITE OPERATIONS** organizational chart



9. **(Pages as necessary) Provide appropriate Oregon license(s) and/or certification(s) necessary to perform services identified in the RFP including proof of State of Oregon Business Licensure or indicate ability to obtain such licensure.**

LICENSING

Currently Stepping Stones has obtained the necessary registrations from the state of Oregon ([See below](#)) and the United States government to operate as a non-profit organization. At the present time, no other certifications or licensures are necessary.

When the need arises and relationships are confirmed, Stepping Stones will work with due diligence with the City of Umatilla or the designated entity to obtain and maintain the necessary business license, city endorsements, licensing restrictions (if apply), employer tax registration, unemployment insurance, industrial insurance, etc.

ADDITIONAL ITEMS

Per advice received during the Bidders Conference, additional attachments which are referenced throughout this document are included in this section. These items are each listed in the Table of Contents as well.

Business Registry Business Name Search

[New Search](#)

Business Entity Data

07-05-2022 17:54

Registry Nbr	Entity Type	Entity Status	Jurisdiction	Registry Date	Next Renewal Date	Renewal Due?
1644486-99	DNP	ACT	OREGON	02-13-2020	02-13-2023	
Entity Name	STEPPING STONES OF HERMISTON INC.					
Foreign Name						
Non Profit Type	PUBLIC BENEFIT					

[New Search](#)

Associated Names

Type	PPB	PRINCIPAL PLACE OF BUSINESS				
Addr 1	505 N 1ST PLACE					
Addr 2						
CSZ	HERMISTON	OR	97838	Country	UNITED STATES OF AMERICA	

Please click [here](#) for general information about registered agents and service of process.

Type	AGT	REGISTERED AGENT			Start Date	02-13-2020	Resign Date	
Name	MICHAEL	ATKINSON						
Addr 1	505 N 1ST PLACE							
Addr 2								
CSZ	HERMISTON	OR	97838	Country	UNITED STATES OF AMERICA			

Type	MAL	MAILING ADDRESS				
Addr 1	PO BOX 395					
Addr 2						
CSZ	HERMISTON	OR	97838	Country	UNITED STATES OF AMERICA	

Type	PRE	PRESIDENT			Resign Date	
Name	CATHY	LLOYD				
Addr 1	1600 W ORCHARD AVE					
Addr 2						
CSZ	HERMISTON	OR	97838	Country	UNITED STATES OF AMERICA	

Type	SEC	SECRETARY			Resign Date	
Name	JEFFREY	SNELL				
Addr 1	505 N 1ST PLACE					
Addr 2						
CSZ	HERMISTON	OR	97838	Country	UNITED STATES OF AMERICA	

[New Search](#)

Name History

Business Entity Name	Name Type	Name Status	Start Date	End Date
STEPPING STONES OF HERMISTON INC.	EN	CUR	02-13-2020	

Please [read](#) before ordering [Copies](#).

[New Search](#)

Summary History

Image	Action	Transaction	Effective	Status	Name/Agent	Dissolved By



PO Box 469
550 W Sperry St.
Heppner, OR 97836
541-676-9161
Fax: 541-676-5662

April 22, 2022

Re: Partnership commitment - Stepping Stones Alliance project Dear

Cathy Lloyd, President, and the Board of Directors,

This letter verifies the commitment of Community Counseling Solutions (CCS) to be a contributing partner in the work to achieve the vision of Stepping Stones Alliance.

We believe Stepping Stones' emergency shelter and transitional housing project would have an immediate positive impact by addressing the existing gap in housing available to individuals and families in need in West Umatilla County and Morrow County. Our understanding of this project's goals has developed through the conversations we have had with Stepping Stones leaders since in February 2022.

In addition, it is our commitment to partner with Stepping Stones in coordination and delivery of wrap-around services and resources necessary for individuals to gain life stability and thus be prepared to move successfully from transitional to permanent housing. CCS works toward providing dynamic, progressive and diverse services to support the well-being of our communities, and is thus prepared to provide one or more of the following services: case management, peer support, referral, screening, assessment and individual therapy.

Thank you for inviting our participation in this important undertaking to better meet the housing and health needs of individuals in our two-county area. We look forward to this partnership continuing in the years ahead.

Sincerely,


Kimberly Lindsay
Executive Director

www.communitycounselingsolutions.org

Providing dynamic, progressive and diverse supports to improve the well-being of our communities.



BMCC PENDLETON
2411 NW Carden Ave. • PO Box 100 • Pendleton, OR 97801
(541) 276-1260 • www.bluecc.edu

June 23, 2022

To Whom It May Concern:

I write with an enthusiastic voice of support for the application soon to be submitted for the Stepping Stone Alliance to develop a Stepping Stones Center.

As one of the key partners in this highly collaborative effort, Blue Mountain Community College (BMCC) has the experience in working with innovative businesses to develop highly successful training programs that will provide the skilled workforce needed to advance the various industries that comprise the region's economy. Collaborating in this project to provide an accessible pathway toward stable housing and self-reliance is a part of our college mission in supporting our communities with basic education and training opportunities.

BMCC is poised to customize training, provide insight and needed expertise in adult basic education, GED, English Language Acquisition, and outreach to collaborating regional partners.

Relationship building is the cornerstone to every worthwhile collaboration and BMCC stands ready to help facilitate and advance this work in all aspects. Please know that I am happy to engage in any further discussions you may feel you need.

With kind regards,

Tammy Krawczyk, Dean
CTE & Workforce Development

BMCC BAKER COUNTY
3275 Baker St.
Baker City, OR 97814
(541) 523-9127

BMCC HERMISTON
975 SE Columbia Dr.
Hermiston, OR 97838
(541) 567-1800

BMCC MILTON-FREEWATER
311 N Columbia Dr.
Milton-Freewater, OR 97862
(541) 938-7176

BMCC MORROW COUNTY
PO Box 939/300 NE Front St.
Boardman, OR 97818
(541) 481-2099



Oregon

Kate Brown, Governor

Employment Department

950 SE Columbia Dr #B

Hermiston, OR 97838

541-786-8458

TTY-TDD 711

www.Employment.Oregon.gov



Date 6-29-2022

RE: Partnership with Stepping Stones Alliance/PATH Project

Dear Cathy Lloyd, President, and the Board of Directors,

This letter verifies the commitment of Oregon Employment Department to be a contributing partner in collaborative work to achieve the vision of Stepping Stones Alliance as a potential Contractor for Umatilla's PATH project.

We believe Stepping Stones' emergency shelter and transitional housing project would have an immediate positive impact and address the existing gap in housing available to individuals and families in need in West Umatilla County.

In addition, it is our commitment to partner with Stepping Stones to assure effective coordination and access to wrap-around services and resources needed by individuals to gain life stability, permanent housing, including training and employment. They will thus be better prepared to move successfully from transitional to permanent housing. Oregon Employment Department works to help all Oregonians and is thus prepared to provide employment services to help bring stability to Oregonians

Thank you for inviting our participation. We look forward to this partnership continuing in the years ahead.

Sincerely,

Matt Willson

Area Manager | Oregon Employment Department | Eastern Oregon Workforce Area

Work Cell: 541-786-8458 | Email: matthew.a.willson@employ.oregon.gov



Developmental Disabilities
Veterans Services

6/27/22

Re: Letter of Support - Stepping Stones Alliance/Project PATH

Dear Cathy Lloyd, President and the Board of Directors,

This letter verifies the commitment and desire of Umatilla County Human Services (Developmental Disabilities Program and Veteran Services Program) to be a contributing partner in the work to achieve the vision of Stepping Stones Alliance.

We believe Stepping Stones' emergency shelter and transitional housing project would have an immediate positive impact by addressing the existing gap in housing available to individuals and families in need in West Umatilla County. Our knowledge of Stepping Stones Alliance's goals has developed since my initial conversations with Cathy at the ROCKit group in 2021, and further information was gathered through community meetings, and mutual participation in the Home 4 Hope consortium and planning for Project Community Connect/Veterans Stand Down later this year.

Umatilla County Developmental Disabilities and Veteran Services are supporting individuals/families to have an opportunity for their best life. UCDD helps individuals with intellectual and developmental disabilities by being committed to health/safety, choice, and community inclusion. Umatilla County Veteran Services is committed to educating, advocating, and navigating veterans' benefits programs with veterans and their families to ensure maximum benefits are received. Both departments are eager to be among the community providers who utilize the proposed Stepping Stones Navigation Center as a point for contact with individuals with intellectual and developmental disabilities and veterans and their families.

Thank you for inviting our participation in this critical undertaking to better meet the housing and health needs of individuals in our area. We look forward to this partnership continuing in the years ahead.

Sincerely,

Kim Beck

Director, Umatilla County Human Services
Developmental Disability Program and Veteran Services

Kim.beck@umatillacounty.gov

541.240.2270

From: [ILAOA Dianna](#)
Sent: Tuesday, July 5, 2022 12:43 AM
To: [SteppingStones Alliance](#)
Subject: RE: Stepping Stones support

Hello Kris,

My apologies, I am out of the office through 07/08/2022. I will get you the letter of support when I return.

Thank you for your patience and understanding. Dianna



Welcome to the Sleep Center

What is the Sleep Center?

The Sleep Center provides a temporary safe place for individuals until they can arrange more permanent housing. It is an emergency shelter and should not be considered a long-term home.

Stepping Stones Alliance does not and shall not discriminate on the basis of race, color, religion (creed), gender, gender expression, age, national origin (ancestry), disability, marital status, sexual orientation, or military status, in any of its activities or operations.

What is required to enter?

The Sleep Center is a low barrier shelter. Admission is open to all adults who need emergency shelter and obey the Sleep Center rules.

Admission is behavior based. As long as individuals are peaceful and obey the rules, they are allowed to enter. This means that although the Sleep Center prohibits alcohol, marijuana, and illicit drugs on site, individuals seeking shelter are not subjected to drug testing as an admission requirement.

Individuals invited to stay are considered Guests of the Sleep Center.

Stepping Stones Sleep Center

Guest Expectations & Agreement

Introduction

Stepping Stones Alliance Board of Directors has established these rules for the Sleep Center. **Before being invited to stay at the Sleep Center, each Guest will acknowledge receipt of this information and agree to abide by that which is stated in this document by signing at the Agreement on the last page.**

Definition: Within this document and the language of Stepping Stones, an expectation is a rule, but it comes from a place respect for all people. Consequences follow when a person chooses to not follow an expectation.

These Guest Expectations ensure the safety and respectful treatment of all Sleep Center Guests and staff.

- **Failure to obey the rules may result in trespass.** Trespass is defined as prohibited/no access to or use of the facility. Serious or multiple violations may result in extended or even permanent trespass.
- **Criminal actions will be immediately reported and responded to by local law enforcement.**

The following rules apply to all three Sleep Center areas:

- 1. Dormitory building**
 - 2. Back patio and smoking area**
 - 3. Storage shed**
- **Loitering is not allowed** outside the front entrance to the Stepping Stones Center buildings or in the vicinity of its secured property line.
 - **Surveillance equipment** includes video cameras.

- **Law enforcement** is ready to respond when loitering is known or suspected.

Section I - Hours, Entrance and Exit

1. **Guests may enter** only between 6:00 p.m. and 10:00 p.m. daily except for emergencies. Anyone seeking entry after 10:00 pm will be denied entry for that evening.

- Guests brought in by police, fire, EMS, hospital staff, clergy or DHS staff may be admitted at any hour.
- Guests who have employment or are attending recovery services may enter after hours if prior arrangements have been made and approved.

2. **Agreement** - Upon arrival Guests must complete Sleep Center Intake. Intake begins with meeting with the Stepping Stones representative to review the **Guest Expectations & Agreement** in full and agreeing by signature to abide by the rules;

3. **Sign In/Out** - Everyone entering and exiting the Sleep Center (guests, volunteers, staff, law officials etc.) must sign in and out at each occurrence.

4. **No Reentry** - Guests who exit between the hours of 10:00 p.m. and 9:00 a.m. may not reenter that night except for emergencies;

5. **Controlled Entry** – No one is allowed in the Sleep Center other than persons who are approved to spend the night (Guests), Stepping Stones representatives or approved EMS or support providers;

6. **Underage Individuals** – No minor shall be allowed in the Sleep Center unless accompanied by his/her parent or legal guardian;

7. **Morning Exit** - Guests responsibilities are to:

- Wipe down the sleeping mat they used every morning using disinfectant wipes (provided)
- **Peaceably exit the Sleep Center by 9:00 a.m.**
- Note: The Sleep Center is closed to all Guests from 9:00 a.m. until 6:00 p.m.

Section II - Behavior and Interactions

8. **Respect Others** - No Guest may do an act, omit or fail to act, engage in a course of activity, or create or maintain a condition which unreasonably:

- Interferes with the comfort, solitude, health, or safety of others
- Offends common decency
- Offends common sensibilities and senses by way of extreme noise, light or odor
- Obstructs or renders hazardous for public Passage any public way or place

9. **Respect Sleep Center Staff** - Guests shall not willfully hinder, delay, or obstruct any security contractor or designated sleep center supervisor in the discharge of their official powers or duties

10. **Substance Influenced Behavior** - Guests who may be under the influence of substances will be allowed to stay as long as they are respectful, cooperative, are non-disruptive and can hold all bodily functions.

11. **No Smoking Inside Sleep Center** – Smoking is allowed in the designated smoke area outside during designated times.

12. **Use of Restrooms** - Guests urinate and defecate only in bathrooms, portable restrooms, porta-potties, or sani-cans designated by the Stepping Stones Center for that purpose

13. **Sleep Clothing** – Guests will abide by these rules:

- Guests must sleep fully clothed. Hoodie, shirt, tank top, shorts, jeans, sweats, pajamas, etc. are considered fully clothed. Undergarments are not considered fully clothed;
- Socks must be worn anytime Guests' feet are on the floor; Socks are available as needed

14. **Sexual Activity Prohibited** –

- There is no co-sleeping by guests of opposite or same sex.
- Guests shall not engage in sexual intercourse, sexual contact (meaning any touching of other intimate parts of another person for the purpose of gratifying sexual desire of either party or a third party), or masturbation;

15. **Sound or Noise** – Guests shall not cause or create any sound or noise that unreasonably disturbs or interferes with the peace, comfort and repose of others

- **Particularly, between the hours of 10pm and 9am**, Guests shall not use instruments or devices that generate or make any sound that can be heard beyond that Guest’s assigned bed area

Section III - Use of Space and Storage of Possessions

14. **Personal Property Space** - Guests shall keep and confine their personal property to the area assigned to them by a designated Sleep Center intake staff. Designated walkways and paths shall be kept clear.

15. **Timeframe** – Guests must remove their personal property from the sleeping area each day, and any items left in the sleeping area after 9:00 a.m. each day shall be deemed abandoned and may be removed by the Stepping Stones Alliance.

16. **Sleep Center Space** - Areas shall be kept clean and free of junk, litter, and debris, and users must deposit their trash and garbage in receptacles designated by the Stepping Stones Alliance for waste disposal.

17. **Private Property** - Users/guests shall not take, use, or possess the personal property of other users without their express permission.

18. **Sleep Center Property** - Guests shall not take, use, or possess property belonging to the Stepping Stones Alliance, its security contractor, or any designated sleep center staff without the express permission of the owner of the property.

19. **Prohibited Property** - With the exception of perishable food, users may not possess or bring any of items prohibited in the Sleep Center from the storage shed into the sleeping area;

Section IV - Prohibited Items

20. **No Weapons** - No weapons may be possessed, displayed, or used except by public safety personnel and security contractors.

21. **No Fires or Open Flames** are allowed.

22. **No Marijuana** may be possessed or used.

23. **No Alcohol** - No open or unopened packages containing alcohol may be possessed.

Section V - Pets

24. **Health and Safety** - Pets shall not be allowed if they are dangerous, diseased, or aggressive toward persons or other animals;

25. **Control and Clean Up** - Pets must be kept on a leash or kept in a kennel, and users must immediately clean up after their pets and dispose of any waste in receptacles designated by the Stepping Stones Alliance for waste disposal;

Section VI - Storage Shed Privileges

The Sleep Center's storage shed may be available for daytime storage of personal belongings as follows:

26. **Storage Container Limit** - Guests are limited to one (1) storage container per person; each container is to be labeled with Guest's name and dated;

27. **Prohibited Storage Items** - Guest's individual storage totes may not store:

- Illegal drugs
- Marijuana
- Alcohol
- Flammable or combustible liquids or materials
- Toxic liquids or materials
- Corrosive liquids or materials
- Weapons
- Ammunition or other explosive materials
- Stolen property
- Perishable foods
- Putrid materials
- Garbage, litter, or debris

28. **Time Limitation** - Property may be stored for no longer than seventy-two (72) consecutive hours (3 days), and any property left in the storage area longer than seventy-two (72) consecutive hours shall be deemed abandoned

and may be removed by the Stepping Stones staff, a security contractor, or a designated Stepping Stones supervisor;

29. **Container Capacity** - All property must be stored in a container designated by the Stepping Stones Alliance for that purpose, and any property left outside of a designated container shall be deemed abandoned and may be removed by the Stepping Stones Alliance, a security contractor, or a designated Stepping Stones supervisor;

30. **Storage Risk** - Property may be stored at the sole risk of its owner, and the Stepping Stones Alliance and/or its personnel shall not be responsible for theft, loss, destruction, or damage of stored property.

Stepping Stones Alliance Sleep Center Guest Rules

AGREEMENT

By signing below, I understand and affirm that I have read and understand the Sleep Center and Storage Shed rules and agree to abide by all applicable rules.

I also understand and affirm that if I violate the rules I may be ordered to immediately leave and not return to the designated sleeping area.

Guest Signature / Date

Printed Name

Witnessed by: _____

Stepping Stones Center Representative / Date

Revised: 4-2-2022

DAY SHELTER - GUEST EXPECTATIONS

- NOTE: You will be asked to verify with your signature, that you understand and accept these expectations.

When you come in

- Sign in please; one at a time
- **Remember COVID;** Maintain appropriate distances (5-6')
We have and encourage masks; Mask must be worn in food area; Exception is when you are eating or sleeping.
Use hand sanitizer and wipes liberally
- Locate the bathrooms; Please limit your time
- **Let us get your food and fix it for you!** We need to limit touches.
You may eat what you want here. Food is not available to take from the shelter other than 1-2 fruit or granola bars.

Behavior Expectation

- Be nice to others in words and actions
- Don't break any laws
- Keep your personal belongings picked up
- Clean up after yourself

Before you leave

- Please put your blanket into a plastic bag for when you return (Staff will write your name on the bag and store it.)
- **Gather up and take all your personal belongings with you**
- Wipe down the spaces, chairs or beds you have used
- Tell staff if you are leaving; They will note the time

Will you need taxi transportation at noon shelter closing?

- Taxi goes to Walmart parking lot
- We will call and schedule the pickup.

GOAL: HOUSING

Action Steps:

1. _____
2. _____
3. _____

Resources or help I need: _____

Follow up date:

Goal Complete

GOAL:

Action Steps:

1. _____
2. _____
3. _____

Resources or help I need: _____

Follow up date:

Goal Complete

GOAL:

Action Steps:

1. _____
2. _____
3. _____

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GOAL:

Action Steps:

1. _____
2. _____
3. _____

Resources or help I need: _____

Follow up date:

Goal Complete

GOAL:

Action Steps:

1. _____
2. _____
3. _____

Resources or help I need: _____

10. (Pages as necessary) Provide proof of insurance or information concerning the ability to obtain insurance protective to the City of Umatilla prior to the start of the contract period to be no less than required under the Oregon Tort Claims Act or \$4,000,000.00, whichever is greater.



June 30, 2022

Stepping Stones of Hermiston Inc

PO Box 395

Hermiston, OR 97838

RE: RFP for Project PATH – City of Umatilla

To Whom it May Concern

Thank you so much for the opportunity to provide insurance coverages as required within the RFP provided by city of Umatilla.

Prior to the start of the contract term, we will provide proof of insurance as required to include City of Umatilla as additional insured with a limit of \$4,000,000 or the amount required by Oregon Tort Claims Act, whichever is greater.

I look forward to hearing back from you regarding the contract.

Sincerely,

A handwritten signature in blue ink that reads 'Aloras Winters'.

Aloras Winters CIC AAI CPIW

Commercial Insurance Agent

PART IV PROPOSER'S STATEMENTS AND CERTIFICATIONS

Proposer's Name: **Stepping Stones Alliance**

PROPOSER'S STATEMENTS

Proposer offers to provide the required services in accordance with the requirements of the RFP stated above and the enclosed proposal. The undersigned Proposer declares that the Proposer has carefully examined the above-named Request for Proposals, and that, if this proposal is accepted, Proposer will execute a contract with the City of Umatilla to furnish the services of the proposal submitted with this form. Proposer attests that the information provided is true and accurate to the best of the personal knowledge of the person signing this proposal, and that the person signing has the authority to represent the individual or organization in whose name this proposal is submitted.

By execution of this Form, the undersigned Proposer accepts all terms and conditions of this RFP except as modified in writing in its proposal. Proposer agrees that the offer made in this proposal will remain irrevocable for a period of sixty (60) days from the date proposals are due.

By execution of this Form, the undersigned Proposer acknowledges that its entire proposal is subject to Oregon Public Records Law (ORS 192.410–192.505) and may be disclosed in its entirety to any person or organization making a records request, except for such information as may be exempt from disclosure under the law. Proposer agrees that all information included in this proposal that is claimed to be exempt from disclosure has been clearly identified either in the Proposer's Statement, or in an itemization attached hereto. Proposer further acknowledges its responsibility to defend and indemnify the City of Umatilla for any costs associated with establishing a claimed exemption.

ADDENDA

Proposer has received and considered, in the enclosed proposal, the terms of any addenda.

CERTIFICATIONS

By signing this Proposer's Certification form, Proposer certifies that:

1. Proposer is is not (check one) a resident bidder, as defined in ORS 279A.120.
2. Proposer has not discriminated and will not discriminate against a subcontractor in awarding a subcontract because the subcontractor is a minority, women, or emerging small business enterprises certified under ORS 200.055 or a business enterprise that is owned or controlled by or that employs a disabled veteran, as defined in ORS 408.225.

3. This proposal is made without connection or agreement with any individual, firm, partnership, corporation, or other entity making a proposal for the same services and is in all respects fair and free from collusion or collaboration with any other Proposer.
4. Proposer has, to the best of Proposer's knowledge, complied with Oregon tax laws in the period prior to the submission of this proposal, including:
 - a. All tax laws of the State of Oregon, including but not limited to ORS 305.620 and ORS chapters 316, 317, and 318,
 - b. Any tax provisions imposed by a political subdivision of this state that applied to Proposer or its property, goods, services, operations, receipts, income, performance of or compensation for any work performed, and
 - c. Any rules, regulations, charter provisions, or ordinances that implemented or enforced any of the foregoing tax laws or provisions.

The undersigned, by signature here, acknowledges, accepts, and certifies to the Proposer's Statements and Certifications as stated above.

PROPOSER

Cathy Lloyd
 Authorized signature

Cathy Lloyd
 Name of authorized signer

President, Board Chair
 Title

7.7.22
 Date

Stepping Stones Alliance
 Proposer's agency or business name

P.O. Box 395
 Address

Hermiston, OR 97838

84-4739478
 Federal Tax ID Number

PROPOSERS STATEMENT OF PERIOD OF PROPOSAL VALIDITY

This proposal from Stepping Stones Alliance is valid until November 15, 2022 (131 days).

Stepping Stones agrees to furnish the services as specified to the City of Umatilla at the prices and with the warranties/guarantees represented for that period.

EXHIBIT D

TRANSITIONAL HOUSING SERVICES AGREEMENT

This TRANSITIONAL HOUSING SERVICES AGREEMENT (this “**Agreement**”), dated as of November 1, 2022 (the “**Effective Date**”), is entered into by and between STEPPING STONES OF HERMISTON INC., an Oregon nonprofit corporation, with offices located at 505 N First Place, Hermiston, Oregon (“**Stepping Stones**”), and CITY OF UMATILLA, an Oregon municipal corporation, with offices located at 700 Sixth Street, Umatilla, Oregon (“**City**”).

1. **Services.** Stepping Stones shall provide to City the services (the “**Services**”) set out in **Exhibit A**. Stepping Stones shall provide the Services (a) in accordance with the terms and subject to the conditions set forth in this Agreement; (b) using personnel of required skill, experience, licenses, and qualifications; (c) in a timely, workmanlike, and professional manner; (d) in accordance with the highest professional standards in Stepping Stones’ field; and (e) to the reasonable satisfaction of City. Stepping Stones shall comply with all City rules, regulations, and policies when providing the Services. Nothing in this Agreement shall be construed to prevent City from itself performing or from receiving services from other providers that are similar or identical to the Services.

2. **Fees and Expenses; Member Fees.**

2.1 For the Services to be performed hereunder, City shall pay to Stepping Stones (against Stepping Stones’ invoice) a fixed fee of \$31,000.00 per month (the “**Fee**”) within thirty (30) days after the end of each month, provided that Stepping Stones has furnished a correct invoice and completed the Services to City’s reasonable satisfaction (as set out in Section 1). The Fee is inclusive of the cost of all materials used for the provision of the Services. City shall reimburse Stepping Stones only for expenses that have been pre-approved in writing by City in its reasonable discretion, within thirty (30) days of receipt by City of Stepping Stones’ invoice, which shall be accompanied by receipts and supporting documentation reasonably acceptable to City.

2.2 In addition to Fees from City, Stepping Stones has pledged to spend at least \$1,100,000.00 of its own funds during the first two years of the Term to provide the Services as mutually identified by Steppings Stones and City. Stepping Stones and City shall collaborate to identify both the initial expenditure of these funds towards the Services during the first two years of the Term. Stepping Stones and City shall enter into a separate agreement concerning the appropriation of these funds towards the Services and the long-term ownership, maintenance, and liability of all capital outlay purchases equal to or greater than \$5,000 and shall do so no later than January 31, 2023.

2.3 Stepping Stones shall establish each adult individual that it provides Services to as a **Member**, which membership City or Stepping Stones may revoke if a Member does not comply with the rules applicable to the Project PATH Facility (defined below) in City or Stepping Stones’ reasonable judgement. Stepping Stones shall assist the City in ensuring that each and every Member shall not be considered a “tenant” under the Oregon Residential Tenant Act (ORS Chapter 90), or any successor laws, and shall ensure that no Member has any rights as a tenant under such laws.

3. **Confidentiality.** All non-public, confidential or proprietary information of City (“**Confidential Information**”), including, without limitation, any information relating to those receiving services from Stepping Stones, disclosed to Stepping Stones, whether disclosed orally or disclosed or accessed in written, electronic, or other form or media, or otherwise learned by Stepping Stones in providing services, and whether or not marked, designated, or otherwise identified as “confidential,” in connection with this Agreement is confidential, solely for Stepping Stones’ use in

performing this Agreement and may not be disclosed or copied unless authorized by City in writing. Confidential Information does not include any information that: (a) is or becomes generally available to the public other than as a result of Stepping Stones' breach of this Agreement; or (b) is obtained by Stepping Stones on a non-confidential basis from a third-party that was not legally or contractually restricted from disclosing such information. Upon City's request, Stepping Stones shall promptly return all documents and other materials received from City. City shall be entitled to injunctive relief for any violation of this Section.

4. Term. This Agreement shall commence as of the Effective Date and shall continue thereafter for a period of two years, then automatically renew for successive one-year periods, unless sooner terminated pursuant to Section 5 (the "Term").

5. Termination Due to Default; Voluntary Termination.

5.1 Either party may terminate this Agreement, effective upon written notice to the other party (the "**Defaulting Party**"), if the Defaulting Party: (a) materially breaches this Agreement, and the Defaulting Party does not cure such breach within 30 days after receipt of written notice of such breach; (b) becomes insolvent or admits its inability to pay its debts generally as they become due; (c) becomes subject, voluntarily or involuntarily, to any proceeding under any domestic or foreign bankruptcy or insolvency law, which is not fully stayed within seven business days or is not dismissed or vacated within 45 days after filing; (d) is dissolved or liquidated or takes any corporate action for such purpose; (e) makes a general assignment for the benefit of creditors; or (f) has a receiver, trustee, custodian, or similar agent appointed by order of any court of competent jurisdiction to take charge of or sell any material portion of its property or business.

5.2 Either party may terminate this Agreement with 90 days' prior written notice to the other party.

5.3 If, for any reason, the City terminates this agreement or elects to not renew this agreement upon the expiration of the term, the City shall pay a Termination Fee to Stepping Stones according to Exhibit B. If, for any reason, Stepping Stones terminates this agreement according to the notification requirements expressed in this agreement, Stepping Stones will receive the amounts due according to Exhibit B, less 20% of the amount owed.

6. Effect of Expiration or Termination. Upon expiration or termination of this Agreement for any reason, Stepping Stones shall promptly: (a) deliver to City all documents, work product, and other materials, whether or not complete, prepared by or on behalf of Stepping Stones in the course of performing the Services; (b) return to City all City-owned property, equipment, or materials in its possession or control; (c) remove any Stepping Stones-owned property, equipment, or materials located at City's locations; (d) deliver to City, all documents and tangible materials (and any copies) containing, reflecting, incorporating, or based on Confidential Information; (e) provide reasonable cooperation and assistance to City in transitioning the Services to an alternate service provider or to the City; (f) on a pro rata basis, repay all fees and expenses paid in advance for any Services which have not been provided; (g) permanently erase all Confidential Information from its computer systems; and (h) certify in writing to City that it has complied with the requirements of this Section 6.

7. Independent Contractor. It is understood and acknowledged that in providing the

Services, Stepping Stones acts in the capacity of an independent contractor and not as an employee or agent of the City. Stepping Stones shall control the conditions, time, details, and means by which Stepping Stones performs the Services. City shall have the right to inspect the work of Stepping Stones as it progresses solely for the purpose of determining whether the work is completed according to this Agreement. Stepping Stones has no authority to commit, act for or on behalf of City, or to bind City to any obligation or liability. Stepping Stones shall not be eligible for and shall not receive any employee benefits from City and shall be solely responsible for the payment of all taxes, FICA, federal and state unemployment insurance contributions, state disability premiums, and all similar taxes and fees relating to the fees earned by Stepping Stones hereunder.

8. **Indemnification.** Stepping Stones shall indemnify, defend, and hold harmless City and its employees, agents, affiliates, successors, and permitted assigns (collectively, "**Indemnified Parties**") against any and all losses, damages, liabilities, deficiencies, claims, actions, judgments, settlements, interest, awards, penalties, fines, costs, or expenses of whatever kind, including reasonable attorneys' fees, fees and the costs of enforcing any right to indemnification under this Agreement, and the cost of pursuing any insurance providers, incurred by Indemnified Parties arising out of or resulting from any claim of a third party arising out of or occurring in connection with Stepping Stones and the Services or this Agreement. Stepping Stones shall not enter into any settlement without City's prior written consent.

9. **Compliance with Law.** Stepping Stones and those it engages to perform the Services are in compliance with and shall comply with all applicable laws, regulations, and ordinances. Stepping Stones and those it engages to perform the Services have and shall maintain in effect all the licenses, permissions, authorizations, consents, and permits that it needs to carry out its obligations under this Agreement.

10. **Insurance.** During the Term and for a period of one year after expiration or termination of this Agreement for any reason, Stepping Stones shall, at its own expense, maintain and carry insurance in full force and effect with financially sound and reputable insurers, that includes, but is not limited to, commercial general liability with limits no less than \$2,000,000 per occurrence and \$4,000,000 in the aggregate (or such amounts as required under the Oregon Tort Claims Act, whichever is greater), including bodily injury and property damage, which policy will include contractual liability coverage insuring the activities of Stepping Stones under this Agreement. Upon City's request, Stepping Stones shall provide City with a copy of the required policies and/or certificate of insurance from Stepping Stones' insurer evidencing the insurance coverage specified in this Agreement. The certificate of insurance shall name City as an additional insured. Stepping Stones shall provide City with 30 days' advance written notice in the event of a cancellation or material change in Stepping Stones' insurance policy. Except where prohibited by law, Stepping Stones shall require its insurer to waive all rights of subrogation against City's insurers and City or the Indemnified Parties.

11. **Oregon Tort Claims Act.** Notwithstanding anything to the contrary in this Agreement, Stepping Stones acknowledges that City's liability is subject to the Oregon Tort Claims Act (ORS Sections 30.260 through 30.300), or any successor law.

12. **General.** Each of the parties hereto shall use reasonable efforts to, from time to time at the request of the other party, without any additional consideration, furnish the other party such further information or assurances, execute and deliver such additional documents, instruments, and

conveyances, and take such other actions and do such other things, as may be reasonably necessary or appropriate to carry out the provisions of this Agreement and give effect to the transactions contemplated hereby. Each party shall deliver all communications in writing either in person, by certified or registered mail, return receipt requested and postage prepaid, by email (with confirmation of transmission), or by recognized overnight courier service, and addressed to the other party at the addresses set forth above (or to such other address that the receiving party may designate from time to time in accordance with this section). This Agreement and all matters arising out of or relating to this Agreement, including tort and statutory claims are governed by, and construed in accordance with, the laws of Oregon, without giving effect to any conflict of laws provisions thereof that would result in the application of the laws of a different jurisdiction. Either party shall institute any legal suit, action, or proceeding arising out of or relating to this Agreement in the federal or state courts in each case located in Portland, Oregon. EACH PARTY HEREBY IRREVOCABLY AND UNCONDITIONALLY: (A) CONSENTS AND SUBMITS TO THE EXCLUSIVE JURISDICTION OF THE AFOREMENTIONED COURTS; AND (B) WAIVES ANY OBJECTION TO THAT CHOICE OF FORUM BASED ON VENUE OR TO THE EFFECT THAT THE FORUM IS NOT CONVENIENT; (C) WAIVES ANY RIGHT TO TRIAL BY JURY; AND (D) WAIVES PERSONAL SERVICE OF ANY SUMMONS, COMPLAINT, OR OTHER PROCESS, WHICH MAY BE MADE BY ANY OTHER MEANS PERMITTED BY OREGON LAW. This Agreement contains the entire understanding of the parties with respect to the subject matter hereof, and supersedes all prior and contemporaneous written or oral understandings, agreements, representations, and warranties with respect to such subject matter. The invalidity, illegality, or unenforceability of any provision herein does not affect any other provision herein. The parties may not amend this Agreement except by written instrument signed by the parties. No waiver of any right, remedy, power, or privilege under this Agreement ("**Right(s)**") is effective unless contained in a writing signed by the party charged with such waiver. No failure to exercise, or delay in exercising, any Right operates as a waiver thereof. No single or partial exercise of any Right precludes any other or further exercise thereof or the exercise of any other Right. The Rights under this Agreement are cumulative and are in addition to any other rights and remedies available at law or in equity or otherwise. Stepping Stones may not directly or indirectly assign, transfer, or delegate any of or all of its rights or obligations under this Agreement, voluntarily or involuntarily, including by change of control, merger (whether or not such party is the surviving entity), operation of law, or any other manner, without the prior written consent of City. Any purported assignment or delegation in violation of this Section shall be null and void. This Agreement is binding upon and inures to the benefit of the parties and their respective successors and permitted assigns. Except for the parties, their successors and permitted assigns, there are no third party beneficiaries under this Agreement. Any provision that, in order to give proper effect to its intent, should survive the expiration or termination of this Agreement, will survive such expiration or termination. This Agreement may be executed electronically and in counterparts.

[Signature page follows]

IN WITNESS WHEREOF, the parties hereto have caused this Agreement to be executed as of the Effective Date by their respective officers thereunto duly authorized.

**CITY:
CITY OF UMATILLA**

By: 
Name: David Stockdale
Title: City Manager

**STEPPING STONES:
STEPPING STONES OF HERMISTON INC.**

By: 
Name: Cathy Lloyd
Title: Board Chair/ President

Exhibit A

Description of Services

Primarily, Stepping Stones will assist the City in the development, implementation, and operation of Project PATH, a program designed to provide Practical Assistance through Transitional Housing ("PATH"). Stepping Stones shall provide a safe space for overnight or longer stays with support services, available onsite at the facility located at the intersection of Bensel Road and Lind Road in Umatilla, Oregon (the "Project PATH Facility"), to individuals and families facing homelessness by planning and delivering services for transitional housing and related support services to support an individual through the transition from homelessness to permanent housing. Specifically, Stepping Stones shall provide the following services to Member participants from the Cities of Hermiston, Umatilla, Echo, and Stanfield and generally western Umatilla County:

1. Provide 24 hour, 7-day a week onsite staffing to support the people using the Project PATH Facility, which includes offices, indoor common area(s), showers, a food pantry, and the community kitchen; initial minimum of 12 housing units that will sleep at least one with some units able to sleep two Members; and outdoor common areas in a secured fenced area.
2. Provide standard operating business hours open to the general public, with restricted access to non-authorized individuals.
3. Provide services in a safe and secure environment that would limit the amount of necessary police intervention at the Project PATH facility.
4. Maintain the Project PATH Facility free of drugs and alcohol.
5. Educational and trade services including, but not limited to, coordination with Members to receive their high school diploma or GED, counseling services to connect Members with local or other traditional educational service providers (BMCC, EOU, and others), and connecting Members with employer education services (such as CDL training, unemployment counselors, trade services, or workforce partnerships).
6. Provide access to basic level medical, dental, and vision services, including the delivery of emergency services, including CPR and first aid and obtaining Crisis Stabilization and Substance Use services as needed.
7. Transportation to work, educational programs, or other support services associated with Project PATH or deemed necessary for the Members' transition. (Assistance needs have already been identified through KAYAK and Umatilla Cab.)
8. Provision of, or connection to, services for persons with behavioral health conditions and/or substance use disorders.
9. Care coordination and/or case management to support access to other needed services that may include education, training, and onsite or offsite work.

10. Provide Sleep Center Services for identified homeless individuals in addition to the Members participating in the Transitional Housing program.
11. Coordinate partners that have proven experience in moving clients from crises situations to stability in homelessness or other situations that are similar.
12. By approximately year three of operations, programmatic offerings expand to include additional sleeping units, Veteran's services, assistance to family units, and basic childcare coordination as needed.
13. Submit two quarterly reports (each October and April) to the City Council, present a semi-annual report (each January), and present an annual report (each July) before the City Council. Submit incidental reports as requested by City and regularly and systematically report on performance of the Services and impacts on recipients. The required content for all reports will be developed by City through collaboration with Stepping Stones. A City representative will be allowed to attend, for informational purposes, regular meetings of Stepping Stones governing board. Stepping Stones shall identify a Executive Director for Project PATH that will interface with City.
14. Provide electronic data sharing, considering relevant privacy and security rules and regulations, to support streamlined coordination of services and rigorous outcomes tracking; share within legal processes and parameters client information with subcontractors and community partners to coordinate care, monitor outcomes, and produce required reports. Data should be tracked and uses with no greater than a 10 percent error rate.
15. Assure that all required core administrative functions, and service delivery operations, are conducted efficiently, effectively, and in compliance with all relevant laws, rules, and regulations. Assure that all funding streams for Services are braided for maximum leverage to support service delivery while assuring that fiscal accounting methods support accountability for use of funds. Braided funding consists of multiple funding streams brought together to pay for more services than any one stream can support and are tracked separately to report to funders. Stepping Stones shall be responsible for identifying, managing, and reporting in a systematic manner to City individual funding streams supporting the Services.
16. At City's request, draft standard operating procedures ("SOPs") and other operational guidance or policy manuals, necessary managerial and fiscal plans, partnership agreements (as appropriate), and perform any work at the Project PATH site, as described in the scope outlined in the body of this agreement, needed prior to opening.
17. Collaborate with City to develop a 5-Year Strategic Plan to be adopted by City Council and all PATH partners no later than May 15, 2023. As necessary, amend all SOPs and other manuals in accordance with the adopted 5-Year Strategic Plan to the City's satisfaction.
18. Maintain reasonable service standards set by City according to the scope of services as described in this agreement. City will make every reasonable effort to collaborate and consult with Stepping Stones prior to the incorporation and implementation of all service standards.

EXHIBIT B

TERMINATION FEE SCHEDULE

Calendar Year Termination Occurs	Total Termination Fee
2023	\$797,000
2024	\$712,000
2025	\$623,000
2026	\$534,000
2027	\$445,000
2028	\$356,000
2029	\$267,000
2030	\$178,000
2031	\$89,000
2032	\$0

Project PATH

Practical Assistance through
Transitional Housing

5-Year Strategic Plan

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Introduction

In the summer of 2018 then Governor Kate Brown and Housing Policy Advisor James LaBar released a Housing Policy Agenda for Oregon addressing Housing Stability for Children, Veterans, and the Chronically Homeless. The Policy Agenda provides background information on families experiencing homelessness, the concern for growing homelessness in the Veterans community, the number of chronically homeless individuals, and a realization that homelessness is not just a problem in Oregon's big cities. It is here in rural eastern Oregon as well.

The Policy Agenda says the following about Rural Communities in Oregon:

Urban Oregonians are not the only people facing housing challenges. An analysis done by Oregon's Office of Economic Analysis (OEA) shows that rural housing affordability is a significant issue in Oregon. OEA found that the median household income in rural Oregon at \$41,098 is very similar to the median household income in the rural United States at \$42,174. However, while median household incomes are similar, the housing prices in rural Oregon are much higher than in the rural U.S. The median home value in rural Oregon is 30 percent higher than in the rural U.S. at \$151,500 compared to \$95,700, and median rents are 16 percent higher in rural Oregon than in the rural U.S. at \$580 compared to \$500.

Other themes heard throughout OHCS's outreach efforts for the Statewide Housing Plan were that the challenges related to housing stability and housing quality are present all across the state, not just in metropolitan areas, and that rural areas often face unique barriers to accessing resources due to limited capacity and infrastructure. The lack of building in rural communities has many causes, including but not limited to: lack of capacity of local governments to plan for and facilitate housing development; identifying buildable lands; local policies that disincentivize residential development; limited capacity or presence of local developers willing to work in rural communities; lack of construction labor/capacity to deliver the housing; and financial dynamics that make it difficult for rural housing developments to be viable.

Emerging law and case law (Martin v City of Boise) prompted the Oregon Legislature in 2021 to pass [House Bill 3115](#) which provides that local law regulating sitting, lying, sleeping, or keeping warm and dry outdoors on public property that is open to the public must be objectively reasonable as to time, place, and manner with regards to persons experiencing homelessness. In western Umatilla County a partnership has emerged bringing the cities of Hermiston, Umatilla, Echo, and Stanfield (HUES) together with Umatilla County to address these issues through Project PATH, a program designed to provide Practical Assistance through Transitional Housing (PATH). The intent is to bring together services to assist individuals and families facing homelessness with the objective to move them into and through transitional housing to permanent housing.

Vision, Mission, and Values

Thanks to the Mid-Columbia Houseless Collaborative for the inspiration.

Vision:

Project PATH envisions a region with equal opportunities and support, where everyone who needs stable housing can find and afford it – especially communities who have faced disproportionate barriers to housing – so everyone can achieve the best quality of life possible.

Mission:

Through collaboration and advocacy, we work to reduce homelessness in western Umatilla County by expanding housing capacity and ensuring supportive services are provided in culturally affirming ways that uphold human dignity.

Values:

Compassion and humanity are at the core of our work. As a collaborative, we recognize the hardships that homeless community members experience and the common humanity we all share, regardless of our housing status.

We value *collaboration and partnership*; working together helps us provide greater support to homeless and unstably housed community members.

Advocacy allows us to do more to support the vulnerable populations we serve when we champion strategic investments, projects, and policy changes.

We elevate *lived experience*. We cannot do this work without acknowledging the disproportionate barriers the housing crisis has created for communities of color and other traditionally marginalized populations. We cannot effectively advocate for solutions without lifting the voices of those who are or have been homeless.

We value *tenacity and perseverance*. Homelessness is a complex issue that cannot be solved overnight; we acknowledge that this work requires visionary leadership and resilience.

Project Description

Project PATH brings together Umatilla County and the communities of Hermiston, Umatilla, Echo, and Stanfield (HUES) to address the issue of homelessness in west Umatilla County. It is envisioned to be a model program implemented to serve multiple communities that will, along with its contractor, provide a PATH from homelessness to transitional housing to permanent housing and along the way begin to address the myriad reasons that an individual or family may be experiencing homelessness that could include lack of work, mental health issues, or substance abuse issues. The Project PATH Advisory Committee members must also work to assure that various types of housing are available within their communities to not only support Project PATH but also provide a continuum of housing options to meet the requirements found in Oregon's statewide planning program under Goal 10 Housing.

To implement a significant part of Project PATH's Vision the Advisory Committee, through the City of Umatilla as the lead agency, will contract to provide a suite of services that will be available to participants within the HUES area. A major component of Project PATH is a facility on property owned by Umatilla County within the City of Umatilla to create a safe space for overnight or longer stays with support services available by referral or onsite. The Stepping Stones Alliance is the designated entity responsible for planning and delivering services for transitional housing and related support services to move an individual or family from homelessness to permanent housing. They are responsible for management of the Project PATH facility that includes a general building with offices, indoor common area(s), showers, and meal facilities; individual shelter units that can accommodate one to two people; and outdoor common areas securely fenced.

A continuum of services to support entry into transitional housing will be used to assist residents utilize various onsite and community services to move towards and into permanent housing. These types of services shall include the following:

- Provide 24 hour, 7-day a week, onsite staffing to support the project buildings that includes offices, residents' showers, a food pantry, and a community kitchen. This includes managing the individual shelter units that will sleep one to two members.
- Educational Services including, but not limited to, coordination with members to receive their high school diploma or GED, counseling services to connect members with local or other traditional educational service providers (BMCC, EOU, and others), and connecting members with employer education services (such as CDL training, unemployment counselors, or workforce partnerships).
- Access to basic level medical, dental, and vision services.
- Access to transportation services to facilitate travel to work, educational programs, or other support services associated with Project PATH or deemed necessary for the member's transition.
- Provision of, or connection to, services for persons with behavioral health conditions and/or substance use disorders.
- Care coordination and/or case management to support access to other needed services

that may include education, training, and onsite or offsite work.

Project PATH, through its contractor, will also provide Emergency Overnight Shelter for identified homeless individuals. A primary purpose of this program offering is to replace the Hermiston Warming Station through use of a dedicated area for these temporary facility users. They will have physically separate sleeping quarters but may have access to selected common and community areas (food pantry and showers as possible examples). Users of these services will need to comply with the entire facilities operational rules but will also have a subset of rules especially for them. This will also be the section of the facility used by law enforcement and emergency responders to house individuals who may be illegally camping in right-of-way, along designated trails, or in parks or have been treated at a local hospital or urgent care.

Project PATH Advisory Committee, Primary Contractor, and Partners

A representative from Umatilla County along with the cities of Hermiston, Umatilla, Echo, and Stanfield comprise the Project PATH Advisory Committee. Working with the primary contractor, the Stepping Stones Alliance, the success of Project PATH will be achieved through partnerships and collaborative situations with other service providers to achieve multiple outcomes in moving clients through the program offerings with success achieved when the client finds permanent housing.

Advisory Committee Members:

Umatilla County	Dan Dorran, Commissioner
City of Hermiston	Byron Smith, Manager
City of Umatilla	Dave Stockdale, Manager
City of Echo	David Slaght, Administrator
City of Stanfield	Benjamin Burgener, Manager

Primary Contractor: Stepping Stones Alliance

Jesalyn Cole, Executive Director
 Board Members (see the Stepping Stones Alliance website for a current list):
 Cathy Lloyd, Board Chair and President
 Michael Atkinson, Board Treasurer
 Chuck Barnes, Board Vice Chair
 Sandy Francis
 Vacancy, Board Secretary
 Phil Spicerkuhn
 Roger Condie
 Vacancy
 Vacancy

Project PATH Partners: This listing is provided as a representation of the partners identified at the time of adoption of the Strategic Plan in Spring 2023. It is anticipated that this list of partners will grow and change over time. For a current listing of active partners in Project PATH and with Stepping Stones Alliance please refer to the Stepping Stones Alliance website.

Provided Service	Service Provider
Education	Blue Mountain Community College (BMCC) Hermiston High School (HHS)
Basic Medical, Dental, and Vision	
Transportation	Kayak (Service of the Confederated Tribes of the Umatilla Indian Reservation (CTUIR) Umatilla Cab Umatilla County Public Transit

Behavioral Health/Substance Abuse Disorders	Community Counseling Solutions (CCS)
Care Coordination/Case Management	Oregon Department of Human Services (DHS) WorkSource Community Outreach Prevention Engagement Services (COPEs) Community Action Program of East Central Oregon (CAPECO)
Value Added Services	Service Providers
Services to Veteran's	Veteran's Service Office (VSO) Umatilla and Morrow Counties Supportive Services for Veterans Families (SSVF) within Blue Mountain Action Council (BMAC)
Transitional Housing for Parents	Martha's House
Fair Housing information and Enforcement	Fair Housing Council of Oregon
Transitional Housing Support Resources	Community Action Program of East Central Oregon (CAPECO)
Outreach and Referrals	Desert Rose Ministries
Domestic Violence Services	Domestic Violence Services (Hermiston)
Subsidized Permanent Housing	Umatilla Housing Authority
Community Partner Services	Service Providers
Law Enforcement support and response	Umatilla Police Department Hermiston Police Department Umatilla County Sheriff's Office
Faith Based Support	Hermiston Faith-Based Advisory Committee Church of Jesus Christ of Latter-Day Saints New Hope Faith Presbyterian Church
Disabled/Developmentally Disadvantaged	ARC of Umatilla County
Hispanic Community Support	Hermiston Hispanic Advisory Committee
Civic Outreach	Rotary Kiwanis Altrusa Lions
Community and Business Sponsorship	Amazon Web Services Good Shepherd Community Health Foundation

FUNDING

Project PATH will be initially funded primarily through the Oregon Department of Administrative Services with funds from [House Bill 4123](#) (2022). Future funding is anticipated to come from a variety of sources including funding from the Contractor, funds obtained through various granting opportunities, general fund sources of the partner agencies, and other funding sources identified to support the variety of services that will be offered. Once this initial funding is expended the Project Path Advisory Committee will need to identify ongoing funding sources and mechanisms to assure Project PATH's success. This could include actions outside of this Strategic Plan within each HUES community and Umatilla County to assure a variety of housing opportunities as envisioned under the statewide planning programs Goal 10. Working with the Umatilla County Housing Authority and local housing developers new housing projects should have available housing for individuals and families working through transitional housing to permanent housing solutions.

The Stepping Stones Alliance brought to the project funds secured through the American Recovery Plan, Amazon Web Services, Good Shepherd Community Foundation Grant, a Fair Housing Grant, a donation from the Church of Jesus Christ of Latter Day Saints, and individual donations. Ongoing funding will need to be planned for and obtained through grants, fundraisers, and work projects that can be developed. Projects throughout the country provide examples of funding opportunities through the creation of stores, service companies, and similar opportunities.

The Project PATH HUES communities, Umatilla County, and the Stepping Stones Alliance are all required to adopt annual budgets which will include funding for necessary annual activities or address how services of the Stepping Stones Alliance will be accomplished.

Words and Phrases to Know

Thanks to the Mid-Columbia Houseless Collaborative for the inspiration.

Affordable and Accessible Housing: Housing that includes features that make it usable for people with disabilities or limited mobility and allows residents to spend no more than 30% of their income to live there.

Area Median Income (AMI): The household income for the “middle” household in a geographic region. Half of the families in a region earn more than the AMI, and half earn less. The U.S. Department of Housing and Urban Development calculates and defines the AMI for specific geographic areas across the county every year. Housing providers then use this number as a reference point when setting local income and affordability requirements for available housing units.

Acquisition and Rehabilitation/Rehab: The process of gaining ownership and management rights over a real estate property and renovating existing units rather than developing new units. Acquisition and rehab are valuable tools used by proponents of affordable housing and preservation.

BIPOC: An acronym that stands for “Black, Indigenous, and people of color.” This is a term used to describe communities of color, while centering the experience of Black and Indigenous people, who experience disproportionately high institutional barriers.

Chronically Homeless: Experiencing homelessness for at least a year, or repeatedly over time, while struggling with a disabling condition like a serious mental illness, substance use disorder, or physical disability.

Coordinated Entry: A process developed to ensure that all people experiencing a housing crisis have fair and equal access to resources and are quickly assessed for, referred, and connected to housing and other assistance based on their vulnerabilities and strengths.

Culturally Responsive/Culturally Specific Services: Being able to understand and consider the different cultural backgrounds of clients, and respecting clients’ customs, experiences, perspectives, and language when assisting them to access resources.

Equity/Equitable: While an Equal approach means giving everyone the same resources, an equitable approach acknowledges that each person has different circumstances, needs, and institutional barriers they have faced. Equity means allocating resources and opportunities in a way that creates equal outcomes.

Equal Opportunity: While equity creates equal outcomes equal opportunity requires treating people without discrimination particularly based on race, sex, age, or disability. It provides an equal playing field.

Goal 10 Housing: As one of 14 statewide planning goals, Goal 10 directs cities to allow a variety of housing locations, types, and densities. In the context of this Strategic Plan Goal 10 is defined as one mechanism that can be used to assure a supply of housing to meet a variety of needs, including housing in support of Project PATH and its stated objectives and priorities.

Guest: An individual who stays at the Emergency Overnight Shelter.

Homeless/Homelessness: Lacking a place to live.

Houselessness: An alternative to homelessness is houselessness because many people who are or have been unhoused prefer it. This is because “home” is more than a building where a person lives; it represents community, social connections, memories, friends, family, or more. People who lack a physical house often still identify strongly with a place they call home.

Housing Stabilization: The process of connecting to a wide range of individualized services – not just those that are directly related to housing – that help facilitate a person’s ability to find and/or stay in housing.

HUES: This refers to the municipalities of Hermiston, Umatilla, Echo, and Stanfield.

Impact Fees: Fees charged to property developers by local governments for the new infrastructure that must be built to accommodate new development.

Individual Shelter Units (ISU): A small one- to two-person unit designed to provide a secured sheltered area for sleeping and limited personal items.

Jail Diversion: Community-based services that are designed to keep individuals, especially those with behavioral health issues, from becoming incarcerated by connecting them to other community-based resources like mental health support, substance abuse services, employment services, and housing. Jail diversion aims to minimize the contact individuals have with law enforcement and help them avoid or reduce jail time.

LGBTQ+: An abbreviation for lesbian, gay, bisexual, transgender, queer or questioning, and more. These terms are used to describe a person’s sexual orientation or gender identity.

Lived Experience (with homelessness): Personal knowledge about homelessness that has been gained because of going through homelessness first-hand rather than through representations constructed by others.

Medical Respite: Medical respite care is short-term residential care for people experiencing homelessness who are too ill or frail to recover from an illness or injury on the streets, but not ill enough to be in a hospital. Medical respite care helps people rest and recover in a safe environment while accessing medical care and other supportive services.

Member: An individual who is participating in services provided through Project PATH and the Stepping Stones Alliance. They may also have an agreement to use an Individual Shelter Unit.

Point in Time Count: Also known as the PIT Count, this is the annual count of sheltered and unsheltered people experiencing homelessness across the United States during the last ten days of January.

Preservation: The process of retaining existing affordable housing, whether at subsidized or fair market costs, and protecting its affordability for current and future tenants.

Rapid Re-Housing: A type of housing assistance that quickly helps people experiencing homelessness to get into housing with the help of application fees, security deposit funding, time-limited rent assistance, incentives to encourage landlords to place clients in their units, and case management services.

Reintegration After Incarceration: The process a person goes through to re-enter society and become a productive member of the community after serving time in jail or prison.

Services/Supportive Services: Aid that makes it easier for someone to get into and stay in housing long-term by enhancing their overall way of living. Examples include help directly related to housing – such as rent assistance – or other resources, such as reliable transportation, affordable childcare, food assistance, training in budgeting and money management, health care, job training, mental health services, or substance abuse treatment.

Supportive Housing: The combination of ongoing affordable housing assistance, such as rent subsidies, with flexible and supportive services for people experiencing homelessness. The goal of supportive housing is to help people stay housed and live a more productive life in the community. There are multiple models of supportive housing: it could include the construction or renovation of new housing, setting aside units in privately-owned buildings, or leasing individual apartments throughout a specific geographic area where clients can receive services from supportive case managers.

Traditional Health Workers: Frontline public health workers who work in a health care clinic or community to assist individuals to achieve positive, health-related outcomes. Examples of traditional health workers include community health workers, personal health navigators, peer support specialists, and peer wellness specialists. Traditional health workers may have a particular specialty area or background, such as being a peer support specialist who uses their personal experience recovering from addiction to help a client struggling with a substance use disorder. Or they may promote health on a more holistic level by helping clients navigate multiple supportive services, including those that are not related to health care but contribute to overall well-being and stability.

Strategic Plan

Thanks to the Mid-Columbia Houseless Collaborative for the inspiration.

To meet the Mission, Vision, and Values identified in this planning document the Project PATH Advisory Board has identified the following Goals and strategies.

Goal Area 1: Shelter

Objective: Assure that shelter is available in west Umatilla County serving the HUES communities. Support the Stepping Stones Alliance in providing shelter services.

Strategic Priorities:

1. The Project PATH Advisory Committee will work to improve coordination with service providers.
2. Identify and prioritize funding for shelter, rehousing, and staff. This includes funding for the Stepping Stones Alliance and their work as a contractor to Project PATH.

Goal Area 2: Services

Objective: Ensure the supportive services delivered in west Umatilla County meet client needs.

Strategic Priorities:

1. Increase accessibility of services with a focus on needs identified by clients.
2. Address gaps in services for the homeless and those at risk of homelessness.
3. Strengthen communication between service providers.
4. Invest in transportation networks to allow those seeking services to get to appointments, work, or other aspects of life's needs.
 - a. Coordinate transportation services to include various Kayak routes and revisions to routes, services provided by local cab or other similar operators, and invest in vehicles as appropriate and available.
 - b. Assure that future updates to the Umatilla County and HUES communities Transportation System Plans include transit and related components with reference to transportation needs related to the homeless and those at risk of homelessness.
 - c. Invest in the required transportation connections imposed by the land use decision for the Project PATH facility in the City of Umatilla which includes a connection to the proposed Umatilla River Trail system connecting the HUES communities.

Goal Area 3: Housing

Objective: Preserve and expand affordable, accessible housing.

Strategic Priorities:

1. Increase the supply of housing units that low-income households can afford.
2. Use preservation, acquisition, and rehabilitation to protect the region's existing supply of affordable, accessible housing.
3. Prioritize access to affordable, accessible housing units for communities of color and other traditionally underserved populations.
4. Educate elected officials, community leaders, and the public about why our region needs more affordable and accessible housing.
5. Assure that the participating communities have Comprehensive Plans with policies

supportive of needed housing at a variety of price ranges and rent levels.

Goal Area 4: Advocacy

Objective: Advocate, engage the community, and build support for the region's efforts to address homelessness.

Strategic Priorities:

1. Communicate to build awareness and support.
2. Use accurate data to inform people of the realities of homelessness and to address opposition to the Advisory Committee's priorities.
3. Advocate for funding and policies that support the Advisory Committee's strategic investments both in our individual communities and the HUES area collaboratively.

The Stepping Stones Alliance has identified that their work will focus on Connecting, Developing, and Supporting. These actions support the Goals, Objectives, and Strategic Priorities identified by the Project PATH Advisory Committee.

Annually the Project PATH Advisory Committee will review this Strategic Plan and if warranted will make changes to assure that these Goals, Objectives, and Strategic Priorities are implemented successfully. The first Strategic Plan was adopted by all five participating jurisdictions through their governing body. Any changes would also need to be adopted by all five governing bodies.

Implementation

To meet the guidelines of HB 4123 funding the following implementation requirements are to be included in this Strategic Plan. They are as follows:

1. Identify funding to support the ongoing operations.
This is addressed earlier in the Strategic Plan under the heading Funding. Ongoing work will be required to assure the longevity of both Project PATH and the Stepping Stones Alliance.
2. Increasing or streamlining resources and services to people at risk of or experiencing homelessness within the participating cities and counties.
Project PATH has identified several Goals, Objectives, and Strategic Priorities that work to assure resources and services are available to those at risk of or experiencing homelessness. While many services have been available within the HUES communities historically this is the first-time coordination of services is being done with the involvement of local cities and the county.

The Stepping Stones Alliance, the Project PATH selected contractor to implement and coordinate delivery of the services, has three components to the program that includes a sleep center, navigation center, and housing center. Individuals generally and most often would enter the program through the emergency overnight shelter which provides night to night shelter. Once established in the program, engagement would occur in the navigation center where needed services and access to resources are available to active members and delivered during all operational hours by staff, community partners, and volunteers. The housing center will initially offer 20 individual shelter units for participants engaged with navigation center resources.

3. Incorporating national best practices for ending homelessness.
Homelessness continues to increase across the HUES Communities, the State of Oregon, and nationally. There are a number of programs and service providers that are doing exemplary work and seeing success in moving participants from homelessness into transitional housing and eventually into permanent housing. But providing that initial shelter is not enough. It requires a continuum of services to address a wide range of concerns and problems that the homeless may be facing that includes access to mental health services, transportation services, job training, and shelter. It also requires working to establish affordable and accessible housing for individuals and families seeking to make the transition. Or in some cases providing that bridge from the edge of the abyss to the promise of a home.
4. Eliminating racial disparities within homeless services within the service area.
The Project PATH Advisory Committee members need to assure that services and materials offered by them, and any partners, are available in English and Spanish. Regionally work with potential partner agencies to assure that offered services are

available without limitations based on racial or other potentially discriminating factors.

Several key Stepping Stone Alliance staff are multilingual. Publications and social media are being provided in English and Spanish. Operation of the Project PATH facility will be done as a low barrier shelter lowering or eliminating barriers to shelter and services.

5. Creating pathways to permanent and supportive housing that is affordable to local populations experiencing or at risk of homelessness.
Project PATH Advisory Committee communities will continue to work on housing opportunities as outlined in Oregon's statewide planning program Goal 10 and the multitude of measures that are being created through legislation and policy work by the State of Oregon. Implementation of the Goals identified earlier in this Strategic Plan will also work to build a larger and more stable supply of affordable and accessible housing options.

Stepping Stones Alliance is partnering with CAPECO and the Umatilla County Housing Authority to create opportunities for permanent housing. Plans include development of larger transitional housing moving to permanent housing over time.