

Contract Review Sheet

Contract for Services

CS-5806-24 - Am3

Title: CDBG Down Payment Assistance Professional Services

Contractor's Name: DevNW

Department: Community and Economic Development Department

Contact: Krista Ulm

Analyst: Kathleen George

Phone #: (503) 373-4447

Term - Date From: January 1, 2024

Expires: December 31, 2027

Original Contract Amount: \$ 50,000.00

Previous Amendments Amount: \$ 92,500.00

Current Amendment: \$ 57,500.00

New Contract Total: \$ 200,000.00

Amd% 300%

Outgoing Funds ☒ Federal Funds ☐ Reinstatement ☐ Retroactive ☒ Amendment greater than 25%

Source Selection Method: 20-0275 Sole Source

CMS# 1472

Description of Services or Grant Award

Contractor assists in providing down payment assistance to low-to-moderate income residents in Marion County utilizing Community Development Block Grant funding (CDBG).

Amendments 1 & 2 added funding and extended the agreement.term.

Amendment 3 adds funding and extends agreement term.

Desired BOC Session Date: 10/28/2026

Contract should be in DocuSign by: 10/7/2026

Agenda Planning Date: 10/15/2026

Printed packets due in Finance: 10/13/2026

Management Update: 10/13/2026

BOC upload / Board Session email: 10/14/2026

BOC Session Presenter(s) Stephen Dickey

Code: Y

REQUIRED APPROVALS

Finance - Contracts _____ Date _____

Contract Specialist _____ Date _____

Legal Counsel _____ Date _____

Chief Administrative Officer _____ Date _____



MARION COUNTY BOARD OF COMMISSIONERS

Board Session Agenda Review Form

Meeting date: October 28, 2026

Department: Community and Economic Development

Title:

CS-5806-24 Amendment 3- DevNW

Management Update/Work Session Date: 9/29/2026

Audio/Visual aids ☐

Time Required: 5 minutes

Contact: Brian Smith

Phone: 503-588-5234

Requested Action:

Approval of Amendment CS-5806-24 Am3 with the DevNW to add \$57,500 of Home Investment Partnerships funds to the Home Buyer Assistance (HBA) program. These funds were approved as part of the 2026-2027 CDBG / HOME Annual Action Plan that was approved through a Public Hearing on May, 13, 2026.

Issue, Description
& Background:

DevNW has been providing contracted services to support the Home Buyer Assistance Program under contract on behalf of the Marion County CDBG / HOME program since January 1, 2024, through contract # CS-5806-24.

In the 2026-2027 CDBG / HOME Annual Action Plan a total of \$384,670 of HOME funding was allocated to the HBA program in addition to the \$1,270,184 of HOME funds currently in the HBA program. \$57,500 of these funds now need to be amended into the current contract with DevNW to fund the services they provide to support the HBA program.

Financial Impacts:

No significant impact to Marion County as the funds for this grant are provided through a HOME grant to Marion County from the U.S. Department of Housing and Urban Development (HUD) in the amount of \$512,819. Sub-awards to the DevNW \$57,500.

Impacts to Department
& External Agencies:

These funds will continue to support the Home Buyer Assistance program operated under contract DevNW.

List of attachments:

CS-5806-24 Am3, CS-5806-24 and Amendments 1 and 2

Presenter:

Steve Dickey

Department Head
Signature:

Kelli Weese

Digitally signed by Kelli Weese
Date: 2026.10.02 15:00:02 -07'00'



**AMENDMENT 3 to CS-5806-24
the CONTRACT FOR SERVICES
between
MARION COUNTY and DEVNW**

This is Amendment 3 to the Contract for Services (as amended from time to time, the “Contract”), dated January 1, 2024 between Marion County, a political subdivision of the State of Oregon, hereinafter called County, and DevNW, hereafter called Contractor.

The Contract is hereby amended as follows (new language is indicated by underlining and deleted language is indicated by ~~striketrough~~):

1. TERM. This Contract expires on December 31, 2027 ~~December 31, 2026~~.

2. CONSIDERATION.

A. The maximum, not-to-exceed compensation payable to Contractor under this Contract, which includes any allowable expenses, is \$200,000.00 ~~\$142,500.00~~.

**EXHIBIT A
STATEMENT OF WORK**

2. COMPENSATION. The total amount available for payment to Contractor under Exhibit A, section 2.A and for authorized reimbursement to Contractor under Exhibit A, section 2.C is \$200,000.00 ~~\$142,500.00~~.

Except as expressly amended above, all other terms and conditions of the original Contract and any previously executed amendments are still in full force and effect. Contractor certifies that the representations, warranties and certifications contained in the original Contract are true and correct as of the effective date of this Amendment and with the same effect as though made at the time of this Amendment.

**MARION COUNTY SIGNATURES
BOARD OF COMMISSIONERS:**

Chair Date

Commissioner Date

Commissioner Date

Authorized Signature: _____
Department Director or designee Date

Authorized Signature: _____
Chief Administrative Officer Date

Reviewed by Signature: _____
Marion County Legal Counsel Date

Reviewed by Signature: _____
Marion County Contracts & Procurement Date

DEVNW SIGNATURE

Authorized Signature: _____
Date

Title: _____

Contract Review Sheet

Contract for Services

CS-5806-24 - Am2Title: **CDBG - Down Payment Assistance Professional Services**Contractor's Name: **DevNW**Department: **Community Services Department**Contact: **Ashley Jackson**Analyst: **Kathleen George**Phone #: **(503) 584-7722**Term - Date From: **January 1, 2024**Expires: **December 31, 2026**Original Contract Amount: **\$ 50,000.00** Previous Amendments Amount: **\$ 30,000.00**Current Amendment: **\$ 62,500.00** New Contract Total: **\$ 142,500.00** Amd% **185%**Outgoing Funds ☒ Federal Funds ☐ Reinstatement ☐ Retroactive ☒ Amendment greater than 25%Source Selection Method: **20-0275 Sole Source**CMS# **1472**

Description of Services or Grant Award

This agreement is to provide professional services for Marion County's Down Payment Assistance Program for applicant document collection, counseling, inspection services, etc.

Amendment 1 extends the term of the agreement and adds additional funding.

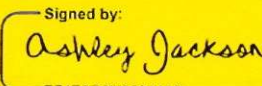
Amendment 2 extends the term of the agreement, adds additional funding, and changes language around compensation.

Desired BOC Session Date: **10/1/2025**Contract should be in DocuSign by: **9/10/2025**Agenda Planning Date **9/18/2025**Printed packets due in Finance: **9/16/2025**Management Update **9/16/2025**BOC upload / Board Session email: **9/17/2025**BOC Session Presenter(s) **Steve Dickey**Code: **Y**

REQUIRED APPROVALS

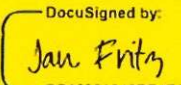
DocuSigned by:

 A3838E7AE6794F4
 Finance - Contracts 9/9/2025
 Date

Signed by:

 E74FAB0008844A0
 Contract Specialist 9/10/2025
 Date

Signed by:

 00C93A0F730248D
 Legal Counsel 9/9/2025
 Date

DocuSigned by:

 00403512400E4EC
 Chief Administrative Officer 9/9/2025
 Date



MARION COUNTY BOARD OF COMMISSIONERS

Board Session Agenda Review Form

Meeting date: 10/15/2025

Department: Community Services

Title: Home Buyer Assistance Professional Services Amendment

Management Update/Work Session Date: 9/30/2025 Audio/Visual aids ☐

Time Required: 10 minutes Contact: Steve Dickey Phone: 503-373-4334

Requested Action: Approve Amendment 2 with DevNW to add additional funds to the Home Buyer Assistance Program and adjust language around compensation.

Issue, Description & Background: Community Services is proposing an amendment to contract CS-5806-24 with the DevNW for the management of the Home Buyer Assistance Program funded with Home Investment Partnerships Program (HOME) grant funds.

Financial Impacts: No significant impact to Marion County as the funds for this grant are provided through HOME grant to Marion County from the U.S. Department of Housing and Urban Development (HUD). Total Contract value of \$142,500.00

Impacts to Department & External Agencies: The approval of this amendment will provide funding to help support the Home Buyer Assistance Program and adjust language around compensation.

List of attachments: Contract for Services Agreement, Amendment 1, Amendment 2

Presenter: Steve Dickey

Department Head Signature: Kelli Whose



Marion County
OREGON

**AMENDMENT 2 to CS-5806-24
the CONTRACT FOR SERVICES
between
MARION COUNTY and DEVNW**

This is Amendment 2 to the Contract for Services (as amended from time to time, the "Contract"), dated January 01, 2024, between Marion County, a political subdivision of the State of Oregon, hereinafter called County, and DevNW, hereafter called Contractor.

The Contract is hereby amended as follows (new language is indicated by underlining and deleted language is indicated by ~~strikethrough~~):

1. TERM. This Contract expires on December 31, 2026. ~~December 31, 2025.~~

2. CONSIDERATION.

A. The maximum, not-to-exceed compensation payable to Contractor under this Contract, which includes any allowable expenses, is \$142,500.00 ~~\$80,000.00.~~

**EXHIBIT A
STATEMENT OF WORK**

2. COMPENSATION. The total amount available for payment to Contractor under Exhibit A, section 2.A and for authorized reimbursement to Contractor under Exhibit A, section 2.C is \$142,500.00.

A. METHOD OF PAYMENT FOR SERVICES: FIXED PRICE PER DELIVERABLE AND GOODS: County shall pay Contractor up to a maximum of \$12,500.00 per completed home purchase. ~~the amounts specified for each of the following deliverables and Goods that County has accepted:~~

~~Application Documentation: \$500.00 per client served.~~

~~Homebuyer Counseling: \$1,500.00 per client served.~~

~~Inspection Costs is \$500.00 per home inspected.~~

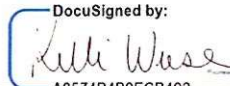
Except as expressly amended above, all other terms and conditions of the original Contract and any previously executed amendments are still in full force and effect. Contractor certifies that the representations, warranties and certifications contained in the original Contract are true and correct as of the effective date of this Amendment and with the same effect as though made at the time of this Amendment.

**MARION COUNTY SIGNATURES
BOARD OF COMMISSIONERS:**

 10/1/2025
Chair Date

 10/1/2025
Commissioner Date

 10.1.2025
Commissioner Date

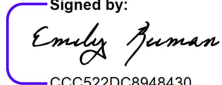
Authorized Signature:  9/9/2025
Department Director or designee Date

Authorized Signature:  9/9/2025
Chief Administrative Officer Date

Reviewed by Signature:  9/9/2025
Marion County Legal Counsel Date

Reviewed by Signature:  9/9/2025
Marion County Contracts & Procurement Date

DEVNW SIGNATURE

Authorized Signature:  10/16/2025
Date

Title: CEO



Marion County
OREGON

AMENDMENT 1 to CS-5806-24
the CONTRACT FOR SERVICES
between
MARION COUNTY and DEVNW

This Amendment No. 1 to the Contract for Services (as amended from time to time, the "Contract"), dated January 01, 2024, between Marion County, a political subdivision of the State of Oregon, hereafter called County, and DevNW, hereafter called Contractor.

The Contract is hereby amended as follows (new language is indicated by underlining and deleted language is indicated by ~~strike through~~):

1. TERM. This Contract expires on December 31, 2025 ~~December 31, 2024~~.

2. CONSIDERATION.

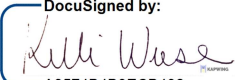
A. The maximum, not-to-exceed compensation payable to Contractor under this Contract, which includes any allowable expenses, is \$80,000.00 ~~\$50,000.00~~.

EXHIBIT A
STATEMENT OF WORK

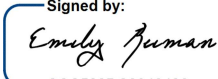
2. COMPENSATION. The total amount available for payment to Contractor under Exhibit A, section 2.A and for authorized reimbursement to Contractor under Exhibit A, section 2.C is \$80,000.00 ~~\$50,000.00~~.

Except as expressly amended above, all other terms and conditions of the original contract are still in full force and effect. Contractor certifies that the representations, warranties and certifications contained in the original Contract are true and correct as of the effective date of this Amendment and with the same effect as though made at the time of this Amendment.

MARION COUNTY SIGNATURES

Authorized Signature:	DocuSigned by:  A8574B4B9ECB492...	11/22/2024
	Department Director or designee	Date
Authorized Signature:	DocuSigned by:  DC16351248DE4EC...	11/22/2024
	Chief Administrative Officer	Date
Reviewed by Signature:	DocuSigned by:  AFD8EB7C0923416...	11/22/2024
	Marion County Legal Counsel	Date
Reviewed by Signature:	DocuSigned by:  A3538E7AEC704F4...	11/22/2024
	Marion County Contracts & Procurement	Date

DEVNW SIGNATURE

Authorized Signature:	Signed by:  GGC522DC8948430...	11/25/2024
		Date

Title: CEO



Contract Review Sheet

CS-5806-24

Contract for Services #: **CS-5806-24** Amendment #: _____

Contact: **Ashley Gresley** Department: **Community Services Department**

Phone #: **(503) 584-7722** Date Sent: **Monday, February 26, 2024**

Title: **CDBG - Down Payment Assistance Professional Services**

Contractor's Name: **DevNW**

Term - Date From: **January 1, 2024** Expires: **December 31, 2028**

Original Contract Amount: \$ **-** Previous Amendments Amount: \$ **50,000.00**

Current Amendment: \$ **-** New Contract Total: \$ **50,000.00** Amd% **0%**

☐ Incoming Funds ☒ Federal Funds ☐ Reinstatement ☐ Retroactive ☐ Amendment greater than 25%

Source Selection Method: **20-0275 Sole Source** CMS# **1472**

Description of Services or Grant Award

This agreement is to provide professional services for Marion County's Down Payment Assistance Program for applicant document collection, counseling, inspection services, etc.

Desired BOC Session Date: _____ Files submitted in CMS for Approval: _____

Agenda Planning Date: _____ Printed packets due in Finance: _____

Management Update: _____ BOC upload / Board Session email: _____

BOC Session Presenter(s): _____

FOR FINANCE USE

Date Finance Received: _____ Date Legal Received: _____

Comments: **B**

REQUIRED APPROVALS

DocuSigned by:

 2/28/2024
 Finance - Contracts Date

DocuSigned by:

 3/5/2024
 Legal Counsel Date

DocuSigned by:

 2/28/2024
 Contract Specialist Date

DocuSigned by:

 3/7/2024
 Chief Administrative Officer Date

REQUEST FOR AUTHORIZATION OF CONTRACT CS-5806-24

Date: 2/14/2024
To: Chief Administrative Officer
Cc: Contract File
From: Ashley Gresley

I. **Subject:** Retroactive

The Marion County Community Services Department is requesting approval of a retroactive contract as described in Section 10-0580 of the Marion County Public Contracting Rules. The contract is with DevNW for CDBG - Down Payment Assistance Professional Services with a value of \$50,000.00 and will be effective retroactive to 1/1/2024 upon approval.

A. BACKGROUND

The Community Services Department posted a Request for Information, to which DevNW was the only respondent. It was the intention of the department to create a short-term contract to bridge the gap between the existing contract expiring on 12/31/2023 and the execution of a new sole source agreement, however due to staff shortages and changes in office location Community Services did not have the capacity to complete these steps prior to the previous contract term expiration.

B. As required in Section 10-0580(2)(a), Department staff will provide an explanation of why the contract was not submitted before performance began:

The Contractor has been providing ongoing services throughout the last calendar year. Due to the continued need for these ongoing services and minimal changes to the new Contract, the Contractor continued providing services which align with the current business needs of the department.

C. As required in Section 10-0580(2)(b), Department staff will provide a description of the steps being taken to prevent similar occurrences in the future:

Community Services will work with the Contractor to ensure that amendments and/or all necessary information are received in a timely manner, giving the County sufficient time to review, process and approve changes to avoid retroactive implementation in the future.

Submitted by:

DocuSigned by:

E74FAB99G8844A0...

Ashley Gresley
Community Services Department

Acknowledged by:

DocuSigned by:

C54889DB24B041A...

Department Head

Reviewed by:

DocuSigned by:

A3538E7AEC704F4...
Contracts & Procurement

Acknowledged by:

DocuSigned by:

1E984034585E453...
Jan Fritz, CAO

**MARION COUNTY
CONTRACT FOR SERVICES
CS-5806-24**

This contract is between Marion County (a political subdivision of the State of Oregon) hereinafter called County, and Corvallis Neighborhood Housing Services Inc. DBA DevNW a/an Oregon, Independent Contractor hereinafter called Contractor.

Contractor agrees to perform, and County agrees to pay for, the services and deliverables described in Exhibit A (the “Work”).

1. TERM

This Contract is effective on January 1st, 2024. This Contract expires on **December 31, 2024**. The parties may extend the term of this Contract provided that the total Contract term does not extend beyond **December 31, 2027**.

2. CONSIDERATION

- A. The maximum, not-to-exceed compensation payable to Contractor under this Contract, which includes any allowable expenses, is **\$50,000.00**. County will not pay Contractor any amount in excess of the not-to-exceed compensation of this Contract for completing the Work and will not pay for Work performed before the date this Contract becomes effective or after the termination of this Contract. If the maximum compensation is increased by amendment of this Contract, the amendment must be fully effective before Contractor performs Work subject to the amendment.
- B. Interim payments to Contractor shall be made in accordance with the payment schedule and requirements in Exhibit A.
- C. If specified below, county’s payments to Contractor under this agreement will be paid in whole or in part with federal funds. If so specified, by signing this agreement, Contractor certifies neither it nor its employees, contractors, subcontractors or subgrantees who will perform the Project activities are currently employed by an agency or department of the federal government. If applicable, Contractor shall comply with Exhibit B: Appendix II to Part 200—Contract Provisions For Non-Federal Entity Contracts Under Federal Awards
In accordance with 2 CFR 200.331, Contractor has been designated:
☐ Subrecipient
☒ Contractor/Vendor
☐ Not applicable – (there are no federal funds tied to the contract)

Catalog of Federal Domestic Assistance (CFDA) #(s) of federal funds to be paid through this Grant: 14.218.

3. COMPLIANCE WITH STATUTES AND RULES

- A. County and Contractor agree to comply with the provisions of this Contract, its exhibits and attachments and all applicable federal, state, and local statutes and rules.
Unless otherwise specified, responsibility for all taxes, assessment, and any other charges imposed by law upon employers shall be the sole responsibility of Contractor. Failure of Contractor or County to

comply with the provisions of this Contract and all applicable federal, state, and local statutes and rules shall be cause for termination of this Contract as specified in sections concerning recovery of funds and termination.

County's performance under this Contract is conditioned upon Contractor's compliance with the obligations intended for contractors under ORS 279B.220, 279B.225 (if applicable to this Contract), 279B.230, 279B.235 (if applicable to this Contract) and ORS 652, which are incorporated by reference herein.

- B. Contractor must, throughout the duration of this Contract and any extensions, comply with all tax laws of this state and all applicable tax laws of any political subdivision of this state. For the purposes of this Section, "tax laws" includes all the provisions described in subsection 28. C. (i) through (iv) of this Contract.

Any violation of subsection B of this section shall constitute a material breach of this Contract. Further, any violation of Contractor's warranty, in subsection 28.C of this Contract, that Contractor has complied with the tax laws of this state and the applicable tax laws of any political subdivision of this state also shall constitute a material breach of this Contract. Any violation shall entitle County to terminate this Contract, to pursue and recover any and all damages that arise from the breach and the termination of this Contract, and to pursue any or all of the remedies available under this Contract, at law, or in equity, including but not limited to:

- i. Termination of this Contract, in whole or in part;
 - ii. Exercise of the right of setoff, and withholding of amounts otherwise due and owing to Contractor, in an amount equal to State's setoff right, without penalty; and
 - iii. Initiation of an action or proceeding for damages, specific performance, declaratory or injunctive relief. County shall be entitled to recover any and all damages suffered as the result of Contractor's breach of this Contract, including but not limited to direct, indirect, incidental and consequential damages, costs of cure, and costs incurred in securing replacement Services.
- C. These remedies are cumulative to the extent the remedies are not inconsistent, and County may pursue any remedy or remedies singly, collectively, successively, or in any order whatsoever.

4. CIVIL RIGHTS, REHABILITATION ACT, AMERICANS WITH DISABILITIES ACT AND TITLE VI OF THE CIVIL RIGHTS ACT

Contractor agrees to comply with the Civil Rights Act of 1964, and 1991, Americans with Disabilities Act of 1990, and Section 504 of the Rehabilitation Act of 1973, and Title VI as implemented by 45 CFR 80 and 84 which states in part, No qualified person shall on the basis of disability, race, color, or national origin be excluded from participation in, be denied the benefits of, or otherwise be subjected to discrimination under any program or activity which received or benefits from federal financial assistance.

5. TIME IS OF THE ESSENCE

Contractor agrees that time is of the essence in the performance of this Contract.

6. FORCE MAJEURE

Neither County nor Contractor shall be responsible for any failure to perform or for any delay in the performance of any obligation under this Contract caused by fire, riot, acts of God, terrorism, war, or any other cause which is beyond the breaching party's reasonable control. Contractor shall, however, make all reasonable efforts to remove or eliminate the cause of Contractor's delay or breach and shall, upon the cessation of the cause, continue performing under this Contract. County may terminate this Contract upon written notice to Contractor after reasonably determining that the delay or breach will likely prevent successful performance of this Contract.

7. FUNDING MODIFICATION

- A. County may reduce or terminate this Contract when state or federal funds are reduced or eliminated by providing written notice to the respective parties.
- B. In the event the Board of Commissioners of County reduces, changes, eliminates, or otherwise modifies the funding for any of the services identified, Contractor agrees to abide by any such decision including termination of service.

8. RECOVERY OF FUNDS

Expenditures of Contractor may be charged to this Contract only if they (1) are in payment of services performed under this Contract, (2) conform to applicable state and federal regulations and statutes, and (3) are in payment of an obligation incurred during the Contract period.

Any County funds spent for purposes not authorized by this Contract and payments by County in excess of authorized expenditures shall be deducted from future payments or refunded to County no later than thirty (30) days after notice of unauthorized expenditure or notice of excess payment.

Contractor shall be responsible to repay for prior contract period excess payments and un-recovered advanced payments provided by County. Repayment of prior period obligations shall be made to County in a manner agreed on.

9. ACCESS TO RECORDS

- A. Contractor shall permit authorized representatives of County, State of Oregon, or the applicable audit agencies of the U.S. Government to review the records of Contractor as they relate to the Contract services in order to satisfy audit or program evaluation purposes deemed necessary by County and permitted by law.
- B. Contractor agrees to establish and maintain financial records, which indicate the number of hours of work provided, and other appropriate records pertinent to this Contract shall be retained for a minimum of three (3) years after the end of the Contract period. If there are unresolved audit questions at the end of the three-year period, the records must be maintained until the questions are resolved.

10. REPORTING REQUIREMENTS

Contractor shall provide County with periodic reports at the frequency and with the information prescribed by County. Further, at any time, County has the right to demand adequate assurances that the services provided by Contractor shall be in accordance with the Contract. Such assurances provided by Contractor shall be supported by documentation in Contractor's possession from third parties.

11. CONFIDENTIALITY OF RECORDS

- A. Contractor shall not use, release, or disclose any information concerning any employee, client, applicant or person doing business with County for any purpose not directly connected with the administration of County's or Contractor's responsibilities under this Contract except upon written consent of County, and if applicable, the employee, client, applicant or person.
- B. Contractor shall ensure that its agents, employees, officers, and subcontractors with access to County and Contractor records understand and comply with this confidential provision.
- C. If Contractor receives or transmits protected health information, Contractor shall enter into a Business Associate Agreement with County, which shall become part of this Contract, if attached hereto.
- D. Client records shall be kept confidential in accordance with ORS 179.505, OAR 309-11-020, 45 CFR 205.50 and 42 CFR Part 2 as applicable.

12. INDEMNIFICATION AND INSURANCE

- A. Contractor shall defend, save, indemnify, and hold harmless County, its officers, agents, and employees from and against all claims, suits, actions, losses, damages, liabilities, costs, and expenses of any nature whatsoever, including attorney fees, resulting from, arising out of, or relating to the activities of Contractor or its officers, employees, subcontractors, or agents under this Contract. Contractor shall have control of the defense and settlement of any claim that is subject to this section. However, neither Contractor nor any attorney engaged by Contractor shall defend the claim in the name of either County or any department of County, nor purport to act as legal representative of either County or any of its departments, without first receiving from County Legal Counsel authority to act as legal counsel for County, nor shall Contractor settle any claim on behalf of County without the approval of County Legal Counsel. County may, at its election and expense, assume its own defense and settlement.
- B. Contractor shall obtain the insurance required under section 23 prior to performing under this Contract and shall maintain the required insurance throughout the duration of this Contract and all warranty periods.
- C. County, pursuant to applicable provisions of ORS 30.260 to 30.300, maintains a self-insurance program that provides property damage and personal injury coverage.

13. EARLY TERMINATION

This Contract may be terminated as follows:

- A. County and Contractor, by mutual written agreement, may terminate this Contract at any time.
- B. County in its sole discretion may terminate this Contract for any reason on 30 days written notice to Contractor.
- C. Either County or Contractor may terminate this Contract in the event of a breach of the Contract by the other. Prior to such termination the party seeking termination shall give to the other party written notice of the breach and intent to terminate. If the party committing the breach has not entirely cured

the breach within 15 days of the date of the notice, then the party giving the notice may terminate the Contract at any time thereafter by giving a written notice of termination.

- D. Notwithstanding section 13C, County may terminate this Contract immediately by written notice to Contractor upon denial, suspension, revocation, or non-renewal of any license, permit or certificate that Contractor must hold to provide services under this Contract.

14. PAYMENT ON EARLY TERMINATION

Upon termination pursuant to section 13, payment shall be made as follows:

- A. If terminated under 13A or 13B for the convenience of County, County shall pay Contractor for Work performed prior to the termination date if such Work was performed in accordance with the Contract. County shall not be liable for direct, indirect, or consequential damages. Termination shall not result in a waiver of any other claim County may have against Contractor.
- B. If terminated under 13C by Contractor due to a breach by County, then County shall pay Contractor for Work performed prior to the termination date if such Work was performed in accordance with the Contract.
- C. If terminated under 13C or 13D by County due to a breach by Contractor, then County shall pay Contractor for Work performed prior to the termination date provided such Work was performed in accordance with the Contract less any setoff to which County is entitled.

15. INDEPENDENT CONTRACTOR

- A. Contractor is a separate and independently established business, retains sole and absolute discretion over the manner and means of carrying out Contractor's activities and responsibilities for the purpose of implementing the provisions of this Contract, and maintains the appropriate license/certifications, if required under Oregon Law. This Contract shall not be construed as creating an agency, partnership, joint venture, employment relationship or any other relationship between the parties other than that of independent parties. The Contractor is acting as an "independent contractor" and is not an employee of County and accepts full responsibility for taxes or other obligations associated with payment for services under this Contract. As an "independent contractor", Contractor will not receive any benefits normally accruing to County employees unless required by applicable law. Furthermore, Contractor is free to contract with other parties for the duration of the Contract.
- B. SUBCONTRACTING/NONASSIGNMENT. No portion of the Contract may be contracted or assigned to any other individual, firm or entity without the express and prior approval of County.

16. GOVERNING LAW AND VENUE

This Contract shall be governed by the laws of the State of Oregon. Any action commenced in connection with this Contract shall be in the Circuit Court of Marion County. All rights and remedies of County shall be cumulative and may be exercised successively or concurrently. The foregoing is without limitation to or waiver of any other rights or remedies of County according to law.

17. OWNERSHIP AND USE OF DOCUMENTS

All documents, or other material submitted to County by Contractor shall become the sole and exclusive property of County. All material prepared by Contractor under this Contract may be subject to Oregon's Public Records Laws.

18. NO THIRD-PARTY BENEFICIARIES

- A. County and Contractor are the only parties to this Contract and are the only parties entitled to enforce its terms.
- B. Nothing in this Contract gives or provides any benefit or right, whether directly, indirectly, or otherwise, to third persons unless such third persons are individually identified by name in this Contract and expressly described as intended beneficiaries of this Contract.

19. SUCCESSORS IN INTEREST

The provisions of this Contract shall be binding upon and inure to the benefit of the parties and their successors and approved assigns.

20. MERGER CLAUSE

This Contract and the attached exhibits constitute the entire agreement between the parties.

- A. All understandings and agreements between the parties and representations by either party concerning this Contract are contained in this Contract.
- B. No waiver, consent, modification or change in the terms of this Contract shall bind either party unless in writing signed by both parties.
- C. Any written waiver, consent, modification, or change shall be effective only in the specific instance and for the specific purpose given.

21. WAIVER

The failure of any Party to enforce any provision of this Contract shall not constitute a waiver by that Party or any other provision. Waiver of any default under this Contract by any Party shall not be deemed to be a waiver of any subsequent default or a modification of the provisions of this Contract.

22. REMEDIES

In the event of breach of this Contract, the Parties shall have the following remedies:

- A. If terminated under 13C by County due to a breach by Contractor, County may complete the Work either itself, by agreement with another contractor, or by a combination thereof. If the cost of completing the Work exceeds the remaining unpaid balance of the total compensation provided under this Contract, then Contractor shall pay to County the amount of the reasonable excess.
- B. In addition to the remedies in sections 13 and 14 for a breach by Contractor, County also shall be entitled to any other equitable and legal remedies that are available.
- C. If County breaches this Contract, Contractor's remedy shall be limited to termination of the Contract and receipt of Contract payments to which Contractor is entitled.

23. INSURANCE

A. **REQUIRED INSURANCE.** Contractor shall obtain at Contractor's expense the insurance specified in this section prior to performing under this Contract and shall maintain it in full force and at its own expense throughout the duration of this Contract and all warranty periods. Contractor shall obtain the following insurance from insurance companies or entities that are authorized to transact the business of insurance and issue coverage in Oregon and that are acceptable to County:

- i. **WORKERS COMPENSATION.** All employers, including Contractor, that employ subject workers, as defined in ORS 656.027, shall comply with ORS 656.017 and shall provide workers' compensation insurance coverage for those workers, unless they meet the requirement for an exemption under ORS 656.126(2). Contractor shall require and ensure that each of its subcontractors complies with these requirements.
- ii. **PROFESSIONAL LIABILITY.** Covering any damages caused by an error, omission or any negligent acts related to the services to be provided under this Contract. Contractor shall provide proof of insurance of not less than the following amounts as determined by County:

☒ **Required by County** ☐ **Not required by County.**

☒ \$1,000,000 Per occurrence limit for any single claimant; and

☒ \$2,000,000 Per occurrence limit for multiple claimants

☐ Exclusion Approved by Risk Manager

- iii. **CYBER LIABILITY.** Covering network security, breach of data, and coverage for regulatory fines and fees imposed against County due to failures in products and services provided under this Contract. Cyber Liability coverage must include errors, omissions, negligent acts, denial of service, media liability (including software copyright), dishonesty, fraudulent or criminal acts by a person or persons whether identified or not, intellectual property infringement, computer system attacks, unauthorized access and use of computer system, regulatory actions, and contractual liability.

☐ **Required by County** ☒ **Not required by County.**

☐ \$2,000,000 Per occurrence limit for any single claimant; and

☐ \$5,000,000 Per occurrence limit for multiple claimants

☐ Exclusion Approved by Information Technology Director and Risk Manager

- iv. **COMMERCIAL GENERAL LIABILITY.** Covering bodily injury, death, and property damage in a form and with coverages that are satisfactory to County. This insurance shall include personal injury liability, products and completed operations. Coverage shall be written on an occurrence basis. Contractor shall provide proof of insurance of not less than the following amounts as determined by County:

☒ **Required by County** ☐ **Not required by County.**

Minimum Limits:

☒ \$1,000,000 Per occurrence limit for any single claimant; and

☒ \$2,000,000 Per occurrence limit for multiple claimants

☐ Exclusion Approved by Risk Manager

- ☐ \$500,000 Per occurrence limit for any single claimant
☐ \$1,000,000 Per occurrence limit for multiple claimant

- v. **AUTOMOBILE LIABILITY INSURANCE.** Covering all owned, non-owned, or hired vehicles. This coverage may be written in combination with the Commercial General Liability Insurance (with separate limits for "Commercial General Liability" and "Automobile Liability"). Contractor shall provide proof of insurance of not less than the following amounts as determined by County:

☐ **Required by County** ☒ **Not required by County.**

Minimum Limits:

- ☐ Oregon Financial Responsibility Law, ORS 806.060 (\$25,000 property damage/\$50,000 bodily injury \$5,000 personal injury).
☐ \$500,000 Per occurrence limit for any single claimant; and
☐ \$1,000,000 Per occurrence limit for multiple claimants
☐ Exclusion Approved by Risk Manager
- B. **ADDITIONAL INSURED.** The Commercial General Liability insurance required under this Contract shall include Marion County, its officers, employees, and agents as Additional Insureds but only with respect to Contractor's activities to be performed under this Contract. Coverage shall be primary and non-contributory with any other insurance and self-insurance.
- C. **NOTICE OF CANCELLATION OR CHANGE.** There shall be no cancellation, material change, potential exhaustion of aggregate limits or non-renewal of insurance coverage(s) without 30 days written notice from this Contractor or its insurer(s) to County. Any failure to comply with the reporting provisions of this clause shall constitute a material breach of Contract and shall be grounds for immediate termination of this Contract by County.
- D. **CERTIFICATE(S) OF INSURANCE.** Contractor shall provide to County Certificate(s) of Insurance for all required insurance before delivering any Goods and performing any Services required under this Contract. The Certificate(s) must specify all entities and individuals who are endorsed on the policy as Additional Insured (or Loss Payees). Contractor shall pay for all deductibles, self-insured retention, and self-insurance, if any.

24. NOTICE

Except as otherwise expressly provided in this Contract, any communications between the parties hereto or notices to be given hereunder shall be given in writing, to Contractor or County at the address or email set forth below or to such other addresses or emails as either party may hereafter indicate in writing. Delivery may be by personal delivery, or mailing the same, postage prepaid.

- A. Any communication or notice by personal delivery shall be deemed delivered when actually given to the designated person or representative.
- B. Any communication or notice mailed shall be deemed delivered five (5) days after mailing. Any notice under this Contract shall be mailed by first class postage delivered to:

To Contractor:

Corvallis Neighborhood Services Inc. DBA
DevNW
Attn: Emily Reiman
212 Main Street
Springfield, OR, 97477

To County:

Procurement & Contracts Manager
555 Court Street NE, Suite 5232
P.O. Box 14500
Salem, Oregon 97309
Fax No. 503-588-5237

25. SURVIVAL

All rights and obligations shall cease upon termination or expiration of this Contract, except for the rights and obligations set forth in sections 2, 7, 8, 9, 10, 11, 12, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 25 and 26.

26. SEVERABILITY

If any term or provision of this Contract is declared illegal or in conflict with any law by a court of competent jurisdiction, the validity of the remaining terms and provisions that shall not be affected and the rights and obligations of the parties shall be construed and enforced as if the Contract did not contain the particular term or provision held to be invalid.

27. AMENDMENTS

This agreement may be amended if mutually agreed to by both parties.

A. Anticipated Amendments

This is anticipated to be amended for the following reasons:

- i. To add additional terms and add funds to cover those additional terms.
- ii. To adjust the rate

B. Unanticipated Amendments

All other amendments for purposes not listed as Anticipated Amendments will be deemed Unanticipated Amendments.

28. CONTRACTOR'S REPRESENTATIONS AND WARRANTIES

Contractor represents and warrants to County that:

- A. Contractor has the power and authority to enter into and perform this Contract.
- B. This Contract, when executed and delivered, is a valid and binding obligation of Contractor, enforceable in accordance with its terms.
- C. Contractor (to the best of Contractor's knowledge, after due inquiry), for a period of no fewer than six calendar years preceding the effective date of this Contract, faithfully has complied with:
 - i. All tax laws of this state, including but not limited to ORS 305.620 and ORS chapters 316, 317, and 318;
 - ii. Any tax provisions imposed by a political subdivision of this state that applied to Contractor, to Contractor's property, operations, receipts, or income, or to Contractor's performance of or compensation for any work performed by Contractor;

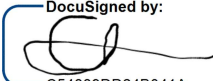
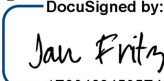
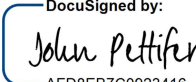
- iii. Any tax provisions imposed by a political subdivision of this state that applied to Contractor, or to goods, services, or property, whether tangible or intangible, provided by Contractor; and
- iv. Any rules, regulations, charter provisions, or ordinances that implemented or enforced any of the foregoing tax laws or provisions.

D. Any Goods granted to the County under this Contract, and Contractor’s Services rendered in the performance of Contractor’s obligations under this Contract, shall be provided to County free and clear of any and all restrictions on or conditions of use, transfer, modification, or assignment, and shall be free and clear of any and all liens, claims, mortgages, security interests, liabilities, charges, and encumbrances of any kind.

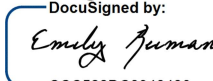
29. CERTIFICATIONS AND SIGNATURE. THIS CONTRACT MUST BE SIGNED BY AN AUTHORIZED REPRESENTATIVE OF CONTRACTOR

The undersigned certifies under penalty of perjury both individually and on behalf of Contractor is a duly authorized representative of Contractor, has been authorized by Contractor to make all representations, attestations, and certifications contained in this Contract and to execute this Contract on behalf of Contractor.

MARION COUNTY SIGNATURES

Authorized Signature:	DocuSigned by:  C54889DD24B041A...	2/28/2024
	Department Director or designee	Date
Authorized Signature:	DocuSigned by:  1E984034585E453...	3/7/2024
	Chief Administrative Officer	Date
Reviewed by Signature:	DocuSigned by:  AFD8EB7C0023416...	3/5/2024
	Marion County Legal Counsel	Date
Reviewed by Signature:	DocuSigned by:  A3538E7AEC704F4...	2/28/2024
	Marion County Contracts & Procurement	Date

Corvallis Neighborhood Housing Services Inc. DBA DevNW SIGNATURE

Authorized Signature:	DocuSigned by:  CCC522BC8948430...	3/11/2024
		Date

Title: CEO

EXHIBIT A STATEMENT OF WORK

1. STATEMENT OF SERVICES

Contractor shall perform Services as described below.

A. GENERAL INFORMATION. Marion County is an entitlement community under the Federal HOME Program and is establishing a Down Payment Assistance Program. The Marion County Community Development Division directs the Down Payment Assistance Program for low-to-moderate income residents (80% AMI or lower) of Marion County. Funding may be allocated to this program periodically throughout the Consolidated Plan period.

B. REQUIRED SERVICES, DELIVERABLES AND DELIVERY SCHEDULE.

i. Contractor shall perform the following:

a. Collection of Documentation

- (1) Assist applicants in collection and submittal of income documentation from applicants according to the IRS Form 1040 Method via Neighborly Software
- (2) Collect demographic data as required under HUD regulations to be reported into Neighborly software for the Consolidated annual performance evaluation report.
- (3) Assist applicant with reporting any additional funding that will be used to acquire a property, with the exception of the actual mortgage, into Neighborly software (ex. Out of pocket funding, state funding, other federal funding, etc.)

b. Homebuyer Counseling

Provide Homebuyer Counseling Services to all applicants receiving funding per HUD Guidelines. The proposer must be HUD-certified Counseling firm or individual. For more information on how to become a HUD-certified counselor please follow the link below:

<https://www.hudhousingcounselors.com/become-hud-housing-counselor>

c. Inspection Services

Provide Inspection Services on applicant potential homes according to Housing Quality Standards (HQS).

ii. County Shall perform the following:

a. Marketing/Outreach

- (1) Provide information for the creation of brochures for the Down Payment Assistance Program.

- (2) Approve Down Payment Assistance Program brochures prior to distribution by Contractor.

b. Collection of Documentation

- (1) Determine eligibility of each applicant entered into Neighborly Software system and perform all reporting requirements.
- c. Provide documentation for homebuyers to sign including but not limited to the trust deeds, promissory notes, and any additional documentation that may be required.
- d. Coordinate with the contractor in regard to loan closing and invoicing on behalf of the homebuyer and contractor.
- e. County will provide two licenses for access to Neighborly Software

C. SPECIAL REQUIREMENTS

Contractor shall be solely responsible for and shall have control over the means, methods, techniques, sequences, and procedures of performing the work, subject to the plans and specifications under this Contract and shall be solely responsible for the errors and omissions of its employees, subcontractors, and agents.

Contractor has the skill and knowledge possessed by well-informed members of its industry, trade or profession and Contractor will apply that skill and knowledge with care and diligence and perform Services in a timely, professional, and workmanlike manner in accordance with standards applicable to Contractor's industry, trade, or profession.

KEY PERSONS. Contractor and County agree that each individual specified below is an individual whose special qualifications and involvement in Contractor's performance of Services form part of the basis of agreement between the parties for this Contract and is an individual through whom Contractor shall provide to County the expertise, experience, judgment, and personal attention required to perform Services ("Key Person"). Each of the following is a Key Person under this Contract:

- Amy Hamilton - Financial Wellbeing Director
- Luis Mendoza - Asset Building Manager (Neighborly License provided by County)
- Joanne Di Paola – Homeownership Specialist
- Jesus Solano - Asset Building Specialist
- Becky Hayes - Senior Accountant

Neither Contractor nor any Key Person of Contractor shall delegate performance of Services that any Key Person is required to perform under this Contract to others without first obtaining County's written consent. Further, Contractor shall not, without first obtaining County's prior written consent, re-assign or transfer any Key Person to other duties or positions so that the Key Person is no longer

available to provide County with that Key Person's expertise, experience, judgment, and personal attention. If Contractor requests County to approve a re-assignment or transfer of a Key Person, County shall have the right to interview, review the qualifications of, and approve or disapprove the proposed replacement(s) for the Key Person. Any individual County approves as a replacement for a Key Person is deemed a Key Person under this Contract.

2. COMPENSATION

The total amount available for payment to Contractor under Exhibit A, section 2.A and for authorized reimbursement to Contractor under Exhibit A, section 2.C is **\$50,000.00**.

- A. **METHOD OF PAYMENT FOR SERVICES: FIXED PRICE PER DELIVERABLE AND GOODS:** County shall pay Contractor the amounts specified for each of the following deliverables and Goods that County has accepted:

Application Documentation: \$500.00 per client served.

Homebuyer Counseling: \$1,500.00 per client served.

Inspection Costs is \$500.00 per home inspected.

- B. **BASIS OF PAYMENT FOR SERVICES.** County shall pay Contractor a per applicant basis upon County's approval of Contractor's invoice submitted to County for completed Services and delivered Goods, but only after County has determined that Contractor has completed, and County has accepted the completed Services and County has accepted the delivered goods. The marketing piece to this contract will be paid as a one-time lump sum payment upon completion. If applicant does not qualify for the program, then a fee for collecting the application documentation and submittal will be paid to the contractor as the inspection and homebuyer counseling will not occur.

Invoicing shall be submitted on a quarterly basis.

- C. **EXPENSE REIMBURSEMENT.** County will not reimburse Contractor for any expenses under this Contract.
- D. **GENERAL PAYMENT PROVISIONS.** Notwithstanding any other payment provision of this Contract, failure of Contractor to submit required reports when due, or failure to perform or document the performance of contracted services, may result in withholding of payments under this Contract. Such withholding of payment for cause shall begin thirty (30) days after written notice is given by County to Contractor, and shall continue until Contractor submits required reports, performs required services or establishes, to County's satisfaction, that such failure arose out of causes beyond the control, and without the fault or negligence of Contractor.
- E. **INVOICES.** Contractor shall send all invoices to County's Contract Administrator at the address specified below or to any other address as County may indicate in writing to Contractor.

Marion County
Attn: Community Services Department, Sarah Coutley
555 Court St NE Ste 3120
Salem , OR 9730
scoutley@com.marion.or.us